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ABSTRACT

These distributive education curriculum guidelines are intended to provide Montana teachers with teaching information for 11 units. Units cover introduction to marketing and distributive education, human relations and communications, operations and control, processes involved in buying for resale, merchandise handling, sales promotion, sales and service, management and decision making, entrepreneurship, economics and marketing, and introduction to computers. For each unit of instruction, these components are provided: an introduction, performance objectives, outline of topics, occupational codes (occupations to which the performance objective and outline are related), and a listing of instructional resources. (The 18 occupations to which the units are related are listed in the introductory material.) Case studies and/or additional resources are found at the end of units. A second section of the guidelines contains competitive events for these areas: advertising services, apparel and accessories, finance and credit, food marketing, food service, general merchandising, and petroleum. For each event are provided the competencies, objective, description, procedure, timing, administrative suggestions, materials and personnel needed, criteria for evaluation, and solution. These materials provide practice to prepare students for competitive events or a contest to test proficiency in the subject area. (YLB)

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MONTANA
CURRICULUM GUIDELINES
FOR
DISTRIBUTIVE EDUCATION

State of Montana

Office of Public Instruction

U.S. DEPARTMENT OF EDUCATION
NATIONAL INSTITUTE OF EDUCATION
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Revised

July 1, 1984

PREFACE

The revision of this manual was developed under a project initiated by Dr. Ron Harris, Director of Cooperative Education at Montana State University. Dr. Harris also served as editor of the manual. Funding for the project was provided by the Office of Public Instruction and coordinated with Redina Berscheid, Supervisor of Marketing and Distributive Education for the State of Montana.

FOREWORD

While vocational teacher education has many goals and objectives, one of the top priorities remains that of equipping teachers with the most up-to-date and current methods of teaching. Toward that end many strategies are employed. And certainly in distributive education, one of the prime strategies is to acquaint teachers with the changing field of marketing as integral to the process of sound vocational education, while providing up-to-date distributive education curriculum guidelines.

Within the past ten year, the field of marketing and distributive education changed dramatically. New products, new rules and regulations, new methods of operation, new marketing techniques have all become part and parcel of the changing business environment. To do the job thoroughly and competently, distributive education teachers need to be updated in the myriad of changes taking place in marketing, while having state-of-the-art materials at their fingertips. That has been the purpose of this revision of the Montana Distributive Education Curriculum Guidelines. It is the author's hope that this revision assists Montana's fine distributive education teachers with a timely, useful, and provocative teaching information.

IMPLEMENTATION GUIDE
FOR
DISTRIBUTIVE EDUCATION

Introduction

These distributive education guidelines owe much to the dedicated group of distributive education teachers and students who, in 1976, drew together the first set of distributive education guidelines. At that time the three following reasons were given for developing the distributive education guidelines.

> First and foremost, there was a need to provide instruction that was based on the job requirements for key marketing occupations in Montana. A second reason was to provide a degree of continuity throughout the State and yet meet the specific needs of local programs. A third reason was to provide a teaching tool that included performance objectives, teaching strategies, class projects and the most current instructional resources. Through the curriculum, distributive education students will be better prepared to enter and advance in the marketing career they have selected.

Each of these reasons are as valid today as they were eight years ago. In fact, each of these reasons have been activated into accomplishment in the State of Montana. There is excellent instruction in distributive education in Montana today. There is also a degree of continuity throughout the State while individual specific needs are met in local programs. Finally distributive education students are better prepared to enter and advance in their chosen marketing career.

Curriculum Revision

The 1984 revision of the distributive education guidelines has taken place in a sequence of events, not unlike the 1976 edition. First, marketing educators from throughout the State of Montana were contacted and asked for suggestions regarding the revision. Following these discussions, marketing programs and curriculum guidelines from throughout the United States were reviewed. Finally, projects, contests and competitive events were all studied with an awareness of the distinctives of marketing education in Montana.

As a result of these sequence of events, the 1984 curriculum guidelines were revised, building in large measure upon the 1976 edition. The following changes have been made:

1.) All resources were updated and significantly expanded;

2.) Case studies were developed for each of the units of instruction;

3.) A new section focusing on marketing and economics was added;

4.) A new section on entrepreneurship was included;

5.) A new section on microcomputers was added;

6.) Competitive events in each of the written events were selected from the multitude available; and

7.) "Additional Resources" pages were added after several of the sections.

Guidelines Format

The Montana Distributive Education Curriculum Guidelines consists of two parts:

1.) Curriculum (Performance Objectives, Instructional Outlines, Key Occupations and Instructional Resources). Each of these categories is defined as follows:

    Performance Objectives--a means of stating what the students are to do, learn, and know from their encounters with a particular unit of instruction.

    Outline--a brief summary of topics, subject materials and ideas which correspond to what the student needs to learn or to know.

    Occupation--each performance objective and outline given in each unit of instruction relates to one or more of the 18 key occupations. These 18 occupations and the corresponding occupational code numbers are listed in another section.

    Instructional Resources--textbooks, films, articles, etc., which may be used by the instructor in teaching a specific unit of instruction.

2.) Competitive events for each of the written events.

Use of the Curriculum Guidelines

Distributive Education teachers will find these guidelines easy to use and filled with useful and helpful teaching information. Simply flip to the unit of instruction you are about to teach, review the Performance Objectives, Outline of Topics, Occupational

Codes and Resources, and the teacher is assured of an up-to-date, relevent teaching guideline. Case Studies can be found at the end of each of the units, while Additional Resources are available at the conclusion of the units as well.

Suggestions for Change

Any suggestions for change in subsequent editions are heartily welcomed. Write to: Supervisor of Distributive Education, Office of Public Instruction, Helena, MT 59601.

OCCUPATIONAL CODES

Occupation	Number
Cashier-Checker	1
Waiter-Waitress	2
Hotel-Motel Clerk	3
Shipping Clerk	4
Receiving Clerk	5
Stock Clerk	6
Advertising Sales	7
Insurance Sales	8
Retail Sales	9
Retail Clerk	10
Food Counter and Fountain Clerk	11
Wholesale Sales	12
Outside Sales	13
Service Station Attendant	14
Wholesale-Retail Buyer	15
Department Manager-Retail Food	16
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Introduction

Introduction to Marketing and Distributive Education

The subject of marketing is a fascinating and interesting one. In large measure, students will gain much of their enthusiasm for the subject based on the D.E. teacher's enthusiasm for the subject.

Many of the skills in this unit are life-long. Concern with careers, finding a job, acquaintance with the basic business environment-each of these subjects are of real, personal interest to students. Their impressions of how to find a job and evaluate career options will go with them for a lifetime. Is there some fresh, new or exciting way in which this material may be presented?

The case studies at the conclusion of this unit, and the additional resources listed, may be of interest to you in preparing this unit of instruction.

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UNIT: INTRODUCTION TO MARKETING AND DISTRIBUTIVE EDUCATION

TOPIC: Introduction to Marketing

Performance Objective(s)	Outline	Occupations	Resources
A. Each student will become aware of the careers related to marketing and distribution.		ALL	
B. The student will be able to define and/or explain marketing.	B-1 The aspects of marketing, distribution, merchandising, & management B-2 Workers in marketing-approximately one-half of all employed workers in the U.S. are employed in marketing B-3 History of marketing	ALL	1. Marketing, 3rd Ed., Mason, Roth & Ross, Gregg McGraw-Hill; Chapters 1,2 & 3, pp. 2-29. 2. Marketing In Action, 8th Ed., Warmke, Palmer and Nolan; Southwestern Publishing Co., Chapters 1,2 & 4, pp. 2-48. 3. Modern Marketing, Rachman & Romano, The Dryden Press; pp. 4-13. 4. Marketing, Wentz, West Publishing Co.; pp. 2-10, 15-16. 5. Transparency Set 12.002, "Introduction to Distributive Education," Montana D.E. Library 6. Economics of Distribution, Occupation Manual; McGraw-Hill Book Co., Chpt 1.

UNIT: INTRODUCTION TO MARKETING AND DISTRIBUTIVE EDUCATION

TOPIC: Introduction to Marketing (Continued)

Performance Objective(s)	Outline	Occupations	Resources
C. The student will be able to identify the institutions and functions of marketing and the channels of distribution.	C-1 The process of marketing institutions-producer, distributor, consumer C-2 Functions of marketing-buying, selling, finance, transportation, storage, risk bearing, promotion, and market information C-3 Channels of distribution a. Producer, consumer b. Producer, wholesaler, retailer, consumer c. Producer, agent, wholesaler, retailer, consumer	ALL	1. Marketing, 3rd Ed., Mason, Roth & Ross, Gregg McGraw-Hill; Chapter 4, pp.29-41 2. Marketing In Action, 8th Ed., Warmke, Palmer and Nolan; Southwestern Publishing Co., pp. 24, 98, 137-40. 3. Transparency Set 12.002, "Introduction to Distributive Education," Montana D.E. Library. 4. Fundamentals of Modern Marketing, 2nd Ed., Cundiff, Still and Govoni; Prentice Hall; Chapter 13, pp. 267-282. 5. Marketing Principles, Nickels; Prentice Hall; pp. 270-292.

UNIT: INTRODUCTION TO MARKETING AND DISTRIBUTIVE EDUCATION

TOPIC: Introduction to Distributive Education

Performance Objective(s)	Outline	Occupations	Resources
A. The student will be able to explain the goals and the structure of the distributive education program.	A-1 Define distributive education A-2 Goals of distributive education A-3 Structure of the D.E. program-the classroom, DECA, the job	ALL	1. Guide for Distributive Education Teacher Coordinators, Montana State Dept. of Public Instruction; pp. 16-17. 2. Transparency Set 12.002, "Introduction to Distributive Education," Montana D.E. Library.
B. The student will be able to describe the role of the classroom and the subjects covered within the D.E. program.	B-1 Role of the classroom B-2 Subjects covered in the classroom	ALL	1. Guide for Distributive Education Teacher Coordinators, Montana State Dept. of Public Instruction; pp. 16-17 & p. 26.
C. The student will be able to define and explain the function of DECA, its goals, and activities.	C-1 Definition of DECA C-2 Goals of DECA C-3 Parlimentary procedure C-4 Club activities a. Financial b. Professional c. Civic d. Social C-5 e. Election of officers 1. Local 2. State 3. National Competitive activities a. Local b. State c. National	ALL	1. National DECA Handbook. 2. Transparency Set 12.002, "Introduction to Distributive Education," Montana D.E. Library. 3. Roberts Rules of Order, Revised. 4. Guide for Distributive Education Teacher Coordinators, Montana State Dept. of Public Instruction; pp. 92-93, 109. 5. Cooperative Occupational Education, 3rd Ed., Mason, Haines & Furtako; pp. 295-320.

UNIT: INTRODUCTION TO MARKETING AND DISTRIBUTIVE EDUCATION

TOPIC: Introduction to Distributive Education (Continued)

Performance Objective(s)	Outline	Occupations	Resources
D. The student will be able to explain the role and responsibilities of a cooperative education student.	D-1 Student responsibilities a. To the school b. To the D.E. program c. To the training station d. To parents e. To himself D-2 Student records a. Importance and need b. Wage and hour c. Training plans and agreements d. Training station report		1. Guide for Distributive Education Teacher Coordinators, Montana State Dept of Public Instruction; pp. 58-62. 2. Successful Cooperative Education, Career World, Inc., "What Is Cooperative Education All About." Slides and cassette, Montana D.E. Library. 3. Montana Cooperative Education Handbook, Montana State Office of Public Instruction; pp. 2-4. 4. Cooperative Occupational Education, 3rd Ed., Mason, Haines & Furtado; pp. 97-119 141-157, 217-253.

UNIT: INTRODUCTION TO MARKETING AND DISTRIBUTIVE EDUCATION

TOPIC: Introduction to Careers in Marketing

Performance Objective(s)	Outline	Occupations	Resources
A. The student will be able to discuss jobs available in marketing and will be able to list interest and aptitudes, personal information, and other information needed to make an intelligent choice about a job.	A-1 Purpose of unit-a program of study about career opportunities in marketing and distribution A-2 Define the word "career" and related terms: vocation, trade, craft, profession, job, etc. A-3 The importance of career planning A-4 Present several jobs available today in marketing A-5 What do you need to know to choose an occupation? a. What you need to know about yourself- interests and aptitudes. Uses of interest and aptitude tests such as the OVIS & GATB b. What you need to know about a job. Use Job Description Form in C.I.U. or pull pertinent information needed from an occupational handbook	ALL	1. Retail Merchandising: Concepts and Application, 9th Ed., Samson, Little & Wingate; Southwestern Publishing Co.; pp. 520-28. 2. Retail Management: A Strategic Approach, Berman & Evans; Macmillen Publishing Co.; pp. 8-13. 3. Modern Retailing: Theory and Practice, Mason & Mayer; Business Publication Inc.; pp. 580-605. 4. Marketing, 3rd Ed., Mason, Roth & Ross, Gregg McGraw-Hill; pp. 29-39. 5. Marketing In Action, 8th Ed., Warmke, Palmer and Nolan; Southwestern Publishing Co.; pp. 413-18. 6. "Your Future in Retailing." Slides and tape, Montana D.E. Library. Career Information Unit for Distributive Education, Ohio D.E. Materials Lab, Teacher's Manual, p. 10, Appendix for OVIS & GATB. 7. Films relevant to this section are available in your school district, the Montana D.E. Library, and the Montana State Film Library. Ex.: "Job for Men", "Jobs for Women", "Jobs in the World of Work"; McGraw-Hill Films. 8. Occupational Outlook Handbook, U.S. Dept of Labor, Current Ed., Bureau of Labor Statistics. 9. Career Information Unit for Distributive Education, Ohio D.E. Materials Lab., Teacher's Manual, pp. 8-12.

UNIT: INTRODUCTION TO MARKETING AND DISTRIBUTIVE EDUCATION

TOPIC: Introduction to Careers in Marketing (Continued)

Performance Objective(s)	Outline	Occupations	Resources
	c. Personal information that would help relate an individual to a job: hobbies, clubs personality, physical attributes, aptitudes, etc.		10. "Your Future in Retailing," Slides and tape, Montana D.E. Library. Career Information Unit for Distributive Education, Ohio D.E. Materials Lab., Teacher's Manual p. 10, Appendix for OVIS and GATB.
B. The student will be able to recognize the clusters that make up the occupational field of marketing and identify the clusters he or she wishes to explore.	B-1 Explore the 25 C.I.U. clusters a. With overhead transparency listing 25 clusters, discuss each cluster in terms of definition, related occupation or industries. B-2 Have each student identify a cluster (or clusters) which he or she wishes to explore in order to help determine an occupational objective. B-3 Form small groups of like cluster choices and proceed through cluster assignments as outlined in Student Handbook of the C.I.U. as instructor desires.	ALL	1. C.I.U. for D.E., Ohio D.E. Materials Lab, Teacher's Manual, p. 11 and Student Handbook. 2. Cooperative Occupational Education, 3rd Ed., Mason Haines & Furtado; pp. 43-44.

UNIT: INTRODUCTION TO MARKETING AND DISTRIBUTIVE EDUCATION

TOPIC: Business Environment

Performance Objective(s)	Outline	Occupations	Resources
A. The student will identify the steps through which a specific product must pass before it reaches the ultimate consumer as a usable product.	A-1 Industrial businesses a. Mining b. Manufacturing c. Construction A-2 Commercial businesses a. Marketing institutions b. Financial institutions c. Service institutions	ALL	1. Business Principles and Management, 6th Ed., Shilt, Everard, Johns; Southwestern Publishing Co.; pp. 3-22. 2. Business In Action, 2nd Ed., Bittal, Burke & LaForge; McGraw-Hill; pp. 4-17.
B. The student will identify features of the American economic system.	B-1 Capitalism B-2 Modified Capitalism	ALL	1. Retail Merchandising: Concepts and Applications, 9th Ed., Samson, Little & 2. Business Principles and Management, 6th Ed., Shilt, Everard, Johns; Southwestern Publishing Co.; p. 44.
C. The student will list the elements needed for a successful business venture and the motives for entering such a venture.	C-1 Land C-2 Labor C-3 Capital C-4 Management C-5 Demand C-6 Supply C-7 Price C-8 Competition C-9 Profit C-10 Service C-11 Social responsibility	ALL	1. Business Principles and Management, 6th Ed., Shilt, Everard, Johns; Southwestern Publishing Co.; pp. 39-49. 2. Retail Merchandising: Concepts and Applications, 9th Ed., Samson, Little & Wingate; Southwestern Publishing Co.; pp. 20-30.

UNIT: INTRODUCTION TO MARKETING AND DISTRIBUTIVE EDUCATION

TOPIC: Business Environment (Continued)

Performance Objective(s)	Outline	Occupations	Resources
D. The student will list the main types of business ownership and be bale to give the advantages and disadvantages of each.	D-1 Sole Proprietorship D-2 Partnership D-3 Corporation a. Holding Company b. Cooperatives c. Mutual Companies	ALL	1. Dynamics of American Business, Justis; Prentice Hall Inc.; pp. 41-59. 2. Marketing, 3rd Ed., Mason, Roth and Ross, Gregg McGraw-Hill; pp. 26-28.

UNIT: INTRODUCTION TO MARKETING AND DISTRIBUTIVE EDUCATION

TOPIC: Job Finding and Orientation

Performance Objective(s)	Outline	Occupations	Resources
A. The student will be able to identify the personal qualifications needed for job success in the field of marketing.	A-1 Personal qualifications a. Physical characteristics 1. Grooming 2. Speech 3. Posture b. Mental characteristics 1. Attitudes 2. Consideration 3. Emotional stability	ALL	1. Professional Development, Wilkes and Crosswait; Harcourt, Brace & Javanovich pp. 50-73, pp. 80-101. 2. Job Orientation, The Employment Interview, Harry R. Moon, 2 Vol. with slides, cassette, and transparencies; Milady Publishing Corp., Montana D.E. Library. 3. Job Interview, International Film Bureau, Four filmstrips and records, Montana D.E. Library.
B. The student will be able to list the various places where employment information can be secured.	B-1 Where to locate a postion a. Newspaper b. State Employment Agency c. Private employment agency d. Friends and relatives e. Signs in windows f. Student placement centers g. Employer himself	ALL	1. Professional Development, Wilkes and Crosswait; Harcourt, Brace & Javanovich pp. 4-23. 2. Your Job in Distribution, Beaumont & Langen; McGraw-Hill; pp. 40-49, pp. 60-126. 3. Retail Merchandising: Concepts and Applications, 9th Ed., Samson Little & Wingate; Southwestern Publishing Co.; pp. 520-524. 4. Succeeding in the World of Work, Kimbrell & Vineyard; McKnight Publishing Co.; pp. 21-25.

UNIT: INTRODUCTION TO MARKETING AND DISTRIBUTIVE EDUCATION

TOPIC: Job Finding and Orientation (Continued)

Performance Objective(s)	Outline	Occupations	Resources
C. The student will be able to demonstrate the skills needed to apply for a job successfully and portray an appropriate attitude toward job application.	C-1 Applying for a position a. Application letter b. Application forms c. Personal data sheet d. Interview 1. Dress 2. Manners 3. Posture 4. Attitude 5. Speech 6. Paper-complete information to have with you e. Testing f. Departure g. Follow up	ALL	1. Professional Development, Wilkes and Crosswait; Harcourt, Brace & Jovanovich pp. 24-44. 2. Retail Management: A Strategic Approach Berman & Evans; Macmillan Publishing Co.; pp. 595-609. 3. Retail Merchandising: Concepts and Applications, 9th Ed., Samson Little & Wingate; Southwestern Publishing Co.; pp. 525-25. 4. Retail Merchandising, 7th Ed., Wingate and Samson; Southwestern Publishing Co., Chapter 12, pp 588-596, 597-604, 605-608. 5. Successful Cooperative Education, Career World Inc., slides and cassette, "How Will I Acquire My First Job and Progress In It?" "As a Young Worker, What New Responsibilities Will I Face?" Montana D.E. Library.

UNIT: INTRODUCTION TO MARKETING AND DISTRIBUTIVE EDUCATION

TOPIC: Job Finding and Orientation (Continued)

Performance Objective(s)	Outline	Occupations	Resources
D. The student will be able to explain legal requirements and identify the records needed for employment.	D-1 Legal requirements for teenage employment a. School work permits b. Social Security c. Physical examination d. Wage and hour laws e. Bonding f. Age	ALL	1. State Employment Agency 2. Wage and Hour Laws, State of Montana-Dept. of Labor, Helena, Montana.
E. The student will be able to describe the store procedures necessary for employment.	E-1 First day a. Store procedures 1. Check in time 2. Closing duties 3. Sick call 4. Employment records b. Location of facilities 1. Lockers 2. Restroom 3. Employee lounge 4. Time clock c. Store organization and lines of authority	ALL	1. Retail Merchandising: Concepts and Applications, 9th Ed., Samson, Little & Wingate; Southwestern Publishing Co.; pp. 178-185.

UNIT: INTRODUCTION TO MARKETING AND DISTRIBUTIVE EDUCATION

TOPIC: Job Finding and Orientation (Continued)

Performance Objective(s)	Outline	Occupations	Resources
F. The student will be able to state company policies and regulations related to his or her employment.	F-1 Company policies a. Internal 1. Employee 2. Merchandise lines 3. Service policies 4. Promotional 5. Handling cash and checks b. External 1. Customer 2. Suppliers 3. Community 4. Competitor	ALL	1. Marketing, 3rd Ed., Mason, Roth & Ross, Gregg McGraw Hill; pp. 392-399.
G. The student will discuss the important issues of business ethics.	G-1 Business ethics a. Importance b. Student's responsibility to their store c. Store's responsibility to 1. Employee 2. Community d. Better Business Bureau	ALL	1. Dynamics of American Business, Justis; Prentice Hall Inc.; pp. 24-27. 2. Introduction to Business, 3rd Ed.; Perlick and Lesikar; Business Publications Inc.; pp. 68-72. 3. Business In Action, 2nd Ed., Bittal, Burke and LaForge; McGraw Hill; pp. 484-491. 4. Professional Development, Wilkes & Crosswait; Harcourt, Brace & Jovanovich; pp. 241-252.

Additional Resources

INTRODUCTION TO MARKETING AND D.E.

Second Effort, Vince Lombardi, Montana D. E. Materials Lab.

Is a Sales Career for You?, Career Resource Films, Counselor Films Inc., Philadelphia, PA.

Is a Career in the Hotel-Motel Business for You?, Career Resource Films, Counselor Films Inc., Philadelphia, PA.

Is a Career in the Service Industries for You?, Carerr Resource Films, Counselor Films Inc., Philadelphia, PA.

Is a Career in Finance, Insurance or Real Estate for You?, Career Resource Films, Counselor Films Inc., Philadelphia, PA.

Fundamentals of Marketing: The Product, Pricing, Channels of Distribution, Eberhardt E. Scheuing, Gregg McGraw-Hill, New York, NY.

The Present & Future Contributions of American Small Business, Sloan, National Business, 600 Maryland Avenue, Washington, D.C. 20024

"Task and Competency Outline for Secondary Marketing and Distributive Education," *Marketing and D. E. Curriculum Guide*, Michigan State University, pp. 1-9.

"Introduction to Marketing," *Marketing and D. E. Curriculum Outlines for Nebraska-Marketing I*, University of Nebraska, pp. 5-9.

"Your Career in Marketing," *Marketing in Action*,Waronke, Palmer, Nolan, pp. 413-418.

"Forms of Business Ownership," *Marketing*, Mason, Rath, Ross, pp. 26-28.

"All You Need to Know When Making Application for Employment," M. H. Lindback, pp. 1-10.

"Banking on Marketing," Steven Mintz, *Sales and Marketing Management*, June 6, 1983, pp. 43-38.

"Converse Breaks Into a Run,"Al Urbanski, *Sales and Marketing Management*, December 5, 1983, pp. 41-42.

Introduction

Human Relations & Communications

There are presently a number of documented studies that stress the importance of human relations to success on the job as well as in other life-settings. Good communication skills are among the top two criteria of Fortune 500 companies. Recruiters and employers increasingly ask for students who can communicate effectively. Do students in D.E. understand the significance of these very important skills to their life-long success?

The updated material, resources and case studies in this unit should aid you in driving home to students the importance of these skills.

UNIT: HUMAN RELATIONS AND COMMUNICATIONS

TOPIC: Human Relations

Performance Objective(s)	Outline	Occupations	Resources
A. Each student will become aware of the careers related to human relations and communications.		ALL	
B. Each student will be able to describe basic concepts necessary for effective human relations.	B-1 Philosophy and psychology B-2 Attitude B-3 Relevancy to occupational success B-4 Business atmosphere B-5 Public relations a. Employee-client b. Management-client c. Community B-6 Management-employee relations B-7 Co-workers relations	ALL	1. Retail Merchandising: Concepts and Applications, 9th Ed., Samson, Little & Wingate; Southwestern Publishing Co.; pp. 529-36. 2. Your Attitude is Showing, booklet and manual, Montana D.E. Library. 3. Human Relations at Work, 2nd Ed.; Eggland & Williams; Southwestern Publishing Inc.; pp. 2-13. 4. Succeeding in the World of Work, Kimbrell & Vineyard; McKnight Publishing Co; pp. 124-136.
C. Each student will be able to demonstrate the characteristics of appropriate business-like appearance.	C-1 Business-like attire C-2 Personal hygiene C-3 Grooming	ALL	1. Professional Development, Wilkes & Crosswait; Harcourt, Brace & Jovanovich; pp. 50-78, pp. 112-142. 2. Dress for Success, Malloy; Viking Press 3. Personal Development for Girls, Montana D.E. Library. 4. Personal Development for Young Men, Montana D.E. Library. 5. Succeeding in the World of Work, Kimbrell & Vineyard; McKnight Publishing Co.; pp. 151-152.

UNIT: HUMAN RELATIONS AND COMMUNICATIONS

TOPIC: Communications

Performance Objective(s)	Outline	Occupations	Resources
A. Each student will be able to use effective written communications in a variety of situations.	A-1 Communications skills a. Plan the message b. Prepare a rough draft c. Five C's 1. Courtesy 2. Correctness 3. Clearness 4. Conciseness 5. Completeness d. Write for reader A-2 Informal written communication a. Memorandum b. Order taking c. Pre-printed form A-3 Formal written communication a. Business letters b. Report writing c. Application letter and resume A-4 Reading skills a. Types of reading 1. Skimming 2. Scanning 3. Intensive b. Comprehension c. Speed	ALL	1. Professional Development, Wilkes & Crosswait; Harcourt, Brace & Javanovich; pp. 170-196. 2. Communications for D.E. Students, Manual Montana D.E. Library. 3. Communications, Manual and transparencies, Montana D.E. Library. 4. Refer to: (reading skills resource) Ms. Rita Brownlee, Supervisor Reading & Language Arts Office of the State Superintendent State Capitol Helena, MT 59601 5. Communications in Marketing, Rowe and Jimmerson; McGraw-Hill, 1971; Chapters 1,3,7,8. (presently out-of-print).

UNIT: HUMAN RELATIONS AND COMMUNICATIONS

TOPIC: Communications (Continued)

Performance Objective(s)	Outline	Occupations	Resources
B. Each student will be able to use effective oral communications in a variety of situations.	B-1 Communication skills a. Five C's of effective 1. Courtesy 2. Correctness 3. Clearness 4. Conciseness 5. Completeness b. Volume and enunciation c. Use of gestures d. Appearance B-2 Informal oral communication a. Introductions b. Conversations c. Group discussion and leadership d. Instructions B-3 Telephone usage B-4 Formal speaking a. Preparation b. Practice c. Delivery B-5 Listening skills a. Basic rules b. Environment c. Note taking	ALL	1. Human Relations at Work, 2nd Ed.; Eggland & Williams; Southwestern Publishing Inc.; pp. 122-54. 2. Communications for D.E. Students, Manual; Montana D.E. Library. 3. Communications, Manual and transparencies; Montana D.E. Library. 4. Teletrainer, Telephone Co. 5. Communications in Marketing, Rowe and Jimmerson; McGraw-Hill, 1971, Chapters 1,2,4,5,6. (presently out-of-print) 6. "Listening Toward Effective Communication," tape; Mountain Bell 7. "How to Lose Your Best Customer Without Really Trying," film; Mountain Bell.

UNIT: HUMAN RELATIONS AND COMMUNICATIONS

TOPIC: Communications (Continued)

Performance Objective(s)	Outline	Occupations	Resources
C. Each student will be able to demonstrate the inter-relationship of communications and human relations.	C-1 Role playing C-2 Game playing C-3 Case problems	ALL	

I. RELATED CASE STUDY: Human Relations

II. CASE TITLE: Developing and Maintaining Harmonious Relationships with Other Employees

III. SUGGESTED GRADE LEVEL: Junior-Senior

IV. CASE OBJECTIVES: The purpose of this case study is to prepare students for adjusting to the work environment. It is oriented toward the Manager-Owner of a small business. At the conclusion of this case study students will be able to:

1. Develop skills in maintaining harmonious relationships with other employees.
2. Maintain an objective attitude in difficult circumstances.
3. Understand the importance of good human relations in the workplace.
4. Know the importance of appropriate dress and maintaining a well-groomed appearance.

V. CASE DESCRIPTION: Tom Johnson has just begun working at Hance's O.K. Hardware. After the second week of work, his sales have been outstanding and he is particularly adept at solving problems for employees. Tom's first week of sales were a little above average, but his second week was higher than four other employees, all of whom have worked at O.K. longer than Tom.

During the morning coffee break, Tom overheard the other employees complaining about his brash manner and the fact that he wore tennis shoes to work and wore his hair over his collar. In short, it appeared that most of the employees were opposed to Tom and he felt very uncomfortable about it.

Tom has now confided in you as the manager that he feels alone and isolated. You sense that Tom is a very sensitive person. He has just told you that unless the attitude towards him changes he will quit.

You are concerned about Tom's situation but also understand the concern of your more established employees. What actions could you take to alleviate this situation for all the parties concened?

VI. SUGGESTED SOLUTION (S):

1. Meet with Tom privately and informally and empathize with his problem. Make clear that you understand his predicament. You might explain the long-standing dress code that has been in effect at Hance's O.K. Be sure he understands the reasons behind a dress code.
2. Meet with the other employees and explain to them the need for tolerance of new employees as they adjust to the store. Perhaps you could hearken back to their beginning days on a new job and the insecurity they felt.

I. RELATED CASE STUDY: Human Relations

II. CASE TITLE: Working with the Problem Career Employee

III. SUGGESTED GRADE LEVEL: Senior

IV. CASE OBJECTIVES: The purpose of this case study is to prepare students for adjusting to the work environment. It is oriented toward the Manager-Owner of a small business. At the conclusion of this case study students will be able to:

1. Develop skill in maintaining harmonious relationships with other employees.

2. Maintain an objective attitude in difficult circumstances.

3. Understand the importance of good human relations in the workplace.

4. Know the importance of appropriate dress and maintaining a well-groomed appearance.

V. CASE DESCRIPTION: As a Distributive Education student at Henessey's Department store, you are paid an hourly wage plus a small bonus for especially productive weeks. One of the other salesmen in the shoe department, Jason, is very experienced, is able to handle more people than you (because of his superior product knowledge), and is the top sales volume producer in the department.

However, a problem has aricen lately and you're not sure what to do about it. Recently, Jason has begun stealing your customers. He will sometimes interrrupt your warm-up conversation with customers, rush them to his seat and proceed to sell them on a particular pair of shoes. At first, you decided to merely overlook the problem thinking it would get better, but it hasn't. In recent weeks your sales sheet is not looking good while Jason's looks outstanding.

What course of action is open to you? If you were department manager, how would you handle this situation?

VI. SUGGESTED SOLUTION (S):

1. Meet with your department manager and explain the situation. If the manager wants you to confront Jason, or refuses to get involved, it would be well to talk about the situation with your coordinator. In any event, you will want to go to Jason and tactfully ask for an explanation. Simply explain that your sales are hurting and you are losing customers because of him. Ask that he refrain from interrupting your conversations with customers in the future.

2. It is your job as an employee to do everything in your power to keep peace with other employees. Of course, this does not mean that you should tolerate unfairness. However, if at all possible you should strive for harmonious relationships with other employees and get the department manager involved as a last resort.

3. If you are a department manager, you need to be sensitive to helping new employees get established, while motivating the more established employees. In this case, clearly Jason needs to be reasoned with and that is one of the functions of your job.

I. RELATED CASE STUDY: Communications

II. CASE TITLE: Effectively Communicating Store Policies to Customers

III. SUGGESTED GRADE LEVEL: Junior

IV. CASE OBJECTIVES: The purpose of this case study is to prepare students to interpret store policies to customers. At the conclusion of this case study the students will be able to:

1. Possess skills in interpreting store policies to customers.
2. Have a knowledge of communicating effectively with customers.
3. Use effective speech and vocabulary in relating to customers.
4. Understand how to address other people in a business-like manner.

V. CASE DESCRIPTION: Valley Electric, a wholesale/retail store, has a distinct return policy with regards to electrical goods. The sign behind the counter states the store policy that all electric goods returned will be subject to a 20% charge and must be returned within a 10 day period. There are no exceptions to this store policy.

George Benson is a frequent customer at Valley Electric and purchases most of his electrical goods for his contracting business at Valley Electric. Last week George bought $1,400 worth of electrical goods but by Monday had returned with one-half of the goods saying "I have misjudged the number of outlets and conduits needed for a major electrical job that I'm doing."

You were at the counter as a part-time employee when the goods were returned. George requested you to credit these goods to his account and to give him a receipt certifying that such a transaction was made. When you informed him of the store policy, he became very angry shouting that he not only had never followed store policy but wasn't even aware that such a policy existed. He insisted, in fact, that if the goods were not taken back that he would take his business elsewhere.

Realizing the importance of George's business for Valley Electric, what actions should you pursue in this situation?

VI. SUGGESTED SOLUTION (S):

1. It is important that George Benson be taken to another area of the store in order to solve this problem so that other customers are not disturbed by his irate behavior.

2. Since this is a policy that is out of your hands you should bring in the manager immediately to handle this problem.

3. If you are the manager, you should consider accepting the return and honoring George's request. The reason for this is quite simple: George is a valued customer and may have honestly been unaware of the store policy. It should be made clear to him, however, the reasons for the policy and requested to honor those in the future. If he has difficulty with any of the store policies in the future, he should give you a personal call.

Additional Resources

HUMAN RELATIONS & COMMUNICATION

Psychology & Human Relations in Marketing, Volume 3, Maasarani and Scheving, 086473-X, Gregg-McGraw-Hill, New York, NY.

See You at The Top, Zig Zigler, pp. 74-93.

"Human Relations Can Make You or Break You," Your Attitude is Showing 4/E, Elwood Chapman, pp. 8-15.

"Dealing with Problem Employees--Are You Part of the Solution or Part of the Problem?", Progressive Grocer, June 1983, Mary Ann Linsen, pp. 113-115.

Introduction

Operations and Control

Knowledge of operational procedures and control is essential to success in marketing. There are reasons behind each of the procedures employed and the controls instituted. Oftentimes if the student realizes the reasoning behind procedures, acceptance and understanding quickly follow. Is the goal of your teaching as a marketing educator to assist students in understanding the "why" of a business operation?

This unit of instruction and following case studies should assist you in explaning to students the "why" of Operations and Control in a local business.

UNIT: OPERATIONS AND CONTROL

TOPIC: Housekeeping

Performance Objective(s)	Outline	Occupations	Resources
A. Each student will become aware of the careers related to operations and control.		ALL	
B. Students will demonstrate an awareness of the need for cleanliness of the facilities and equipment in the retail outlet.	B-1 Cleaning the sales and service areas	1,2,9,10, 11	1. Retail Merchandising: Concepts and Applications, 9th Ed.; Samson, Little & Wingate; Southwestern Publishing Co.; pp. 353-355, 408-410. 2. O-T-J Training
	B-2 Cleaning the merchandise display areas	6,9,10,17 10,14	
	B-3 Cleaning outside store facilities (drive area, sidewalk, etc.)		
	B-4 Cleaning sales supporting areas (dressing rooms, restrooms, etc.)	10,14	
C. Students will demonstrate an awareness of the need for an orderly arrangement of merchandise.	C-1 Straighten and arrange stock on selling floor	2,6,9,10,11 16,17	1. O-T-J Training 2. Chain Store Age, Department Store Economist; Texas Materials.
	C-2 Arrange supplies in sales and service areas	1,2,9,10,11	
D. Students will be able to demonstrate an awareness when supplies and merchandise need to be removed or replaced.	D-1 Removing merchandise, supplies, and special displays when necessary from selling area	2,10,11	1. O-T-J Training.
	D-2 Remove damaged or spoiled merchandise from selling area	16	

UNIT: OPERATIONS AND CONTROL

TOPIC: Cash Register and Check-Out-Station Operation

Performance Objective(s)	Outline	Occupations	Resources
A. Students will be able to identify the principal parts of the cash register.	A-1 Indication A-2 Receipt tape and slot A-3 Sales journal tape A-4 Amount keys A-5 Department keys A-6 Transaction keys A-7 Key release lever A-8 Read and reset keys A-9 Activity counter A-10 Date mechanism A-11 Cash drawer A-12 Change plate A-13 Hand crank insert A-14 Sales person keys	1,2,3,9,10 11,14,17,18	1. Checker-Cashier, Edison and Mills; Southwestern Publishing Co.; pp. 7-13.
B. Students will be able to accurately operate the cash register.	B-1 Home keys B-2 Thumb group area B-3 Index finger area B-4 Second finger area	1,2,3,9,10 11,14,17,18	1. Checker-Cashier, Edison and Mills; Southwestern Publishing Co.; pp. 14-21.
C. Students will be able to operate the checkstand area and demonstrate correct money handling procedures.	C-1 Greeting the customer C-2 Check sale items or C-3 Move recorded items C-4 Ask "Is there anything else?" C-5 Subtotal and Total (Sales Tax) C-6 Inform customer of sale amount and receive cash payment C-7 Compute change manually and count back to customer C-8 Place payment in cash drawer in proper compartments	1,2,3,9,10 11,14,17,18	1. Checker-Cashier, Edison and Mills; Southwestern Publishing Co.; pp. 27-35. 2. Project: Change Making Procedures. 3. Money Safeguarding Procedures; Cash Registers--Their Place in Modern Retail Security; Register Co., Dayton, Ohio; Educational Materials Division.

UNIT: OPERATIONS AND CONTROL

TOPIC: Cash Register and Check-Out-Station Operation (Continued)

Performance Objective(s)	Outline	Occupations	Resources
	C-9 Cash customer checks C-10 Give customer sales receipt C-11 Handling coupons, refunds, food stamps C-12 Place sold merchandise in proper bag or container, if necessary C-13 Thank the customer		
D. Students will demonstrate the ability to process credit card sales transactions.	D-1 Receive card from customer and check list of bad charge card accounts D-2 Check credit card maximum amount D-3 Have customer sign charge card form D-4 Return charge card and form copy to customer D-5 Place store copy in proper location	1,2,3,9,10 11,14,17,18	1. Retailing Merchandising: Concepts and Application, 9th Ed., Samson, Little & Wingate; Southwestern Publishing Co.; pp. 151-52. 2. Project: Processing Credit Card Transactions-with outside speaker/resource person.
E. Students will be aware of the new trends and types of cash register systems.	E-1 Universal product code E-2 Electronic and computerized cash register operations	1,2,3,9,10, 11,14,17,18	1. Project: Processing Credit Card Transactions--with outside speaker/resource person.

UNIT: OPERATIONS AND CONTROL

TOPIC: Cash Register and Chec-Out-Station Operation (Continued)

Performance Objective(s)	Outline	Occupations	Resources
F. Students will demonstrate the ability to process proper methods of check cashing.	F-1 Receive check from customer and check for correct spelling and numbering of amount tender or check amount and signature F-2 Properly fill out required information on check for later reference and for approval of check; 1. Two identifications: a. Driver's license b. Credit card or guaranteed check card 2. Telephone number 3. Student's ID number, if applied 4. Properly obtain supervisor's signature for approval 5. Endorse back side of check	1,2,3,9,10,	1. Retail Merchandising: Concepts and Applications, 9th Ed.,; Samson, Little & Wingate; Southwestern Publishing Co.; pp. 509-10. 2. Project: Processing Credit Card Transactions--with outside speaker/resource person.

UNIT: OPERATIONS AND CONTROL

TOPIC: Recordkeeping and Closing

Performance Objective(s)	Outline	Occupations	Resources
A. Students will demonstrate an awareness of and an ability to provide accurate recordkeeping of both cash and credit transactions.	A-1 Check supply of credit and miscellaneous forms	1,9,10,14, 17,18	1. O-T-J Training
	A-2 Signing in and signing out on sales journal	1,9,10	
	A-3 Checking roles of tape and date on register		
	A-4 Proper marking and routing of customer personal check for policy payment	8	
B. Students will demonstrate an awareness of and an ability to sort and route cash receipts, credit forms, bank deposit slips and sales forms to appropriate management personnel.	B-1 Counting and separating cash receipts for the sales day and/or shift	1,9,10,14	1. Checker-Cashier, Edison and Mills; Southwestern Publishing Co., pp. 34-36. 2. O-T-J Training
	B-2 Collecting and sorting various sales and charge forms	1,9,10,14	
	B-3 Submit cash receipts, charge forms and sales forms to management	1,9,10	
	B-4 Clear register and make deposit slip		
C. Students will identify the proper procedures for closing the business at the end of the sales day.	C-1 Bringing in outside merchandise	10,14	1. O-T-J Training
	C-2 Turning off lights and equipment		
	C-3 Locking doors and display cases		

I. RELATED CASE STUDY: Operations and Control

II. CASE TITLE: Authorizing Customer Checks in Accordance with Store Policy

III. SUGGESTED GRADE LEVEL: Senior

IV. CASE OBJECTIVES: The purpose of this case study is to acquaint students with the authorization procedure for authorizing customer checks. At the conclusion of this case study students will be able to:

1. Understand the authorization procedure for customer checks.
2. Know how to contend with a case of shoplifting.
3. Possess skill in recognizing and handling shop lifters.

V. CASE DESCRIPTION: You have been working at the Safeway store in the stocking area for the past six months. However, on this evening it is very busy up front and they've asked you to come up and run the cash register which you have been trained to do over the past few months.

After handling your third customer, the fourth customer comes through the aisle and after ringing up his merchandise he proceeds to write a check for the purchase. Store policy requires a valid drivers license and at least one major credit card. However, this customer explained that he only has a driver's license as identification. He, of course, insisted that the check was good and would cause no problems for the salesperson. In this case you decide to make an exception and accept the check.

Several minutes later as you return to your stocking area you notice three plastic cellophane record wrappers on the floor. You had noticed just prior to this several teenage girls hanging around the front of the store joking and kidding around but they didn't seem interested in buying anything. Immediately you go to inform security, but before getting to the offices, security enters the department with the two girls. The security guard indicated that these girls were caught shop lifting when tags fell from one of their pockets. They had more than $40 worth of merchandise on them and were walking out of the store

Several days later the store manager called you in and indicated that you had taken a bad check for $25 and the money would be deducted from your paycheck.

Explain what you think lead to this situation and any prevention measures for shop-lifting and fraudulent checks which could have prevented each of these occurrences.

VI. SUGGESTED SOLUTION (S): Both shoplifting and fraudulent checks are a major source of concern for retail stores. In this case store personnel were simply not doing their duties. With regard to the fraudulent check you as a saleperson went against store policy and made yourself responsible for the validation of the check. In this case store management should have been called. In order to prevent shoplifting, several measures should be taken.

1. Store personnel should keep track of the areas for which they have been assigned. During slow periods employees should be looking after their particular area.

2. The store could consider installing an electronic device.

3. Training of store personnel is one of the best prevention measures a store can take. Local police departments can give needed information and perhaps conduct seminars in order to help personnel identify potential shoplifters.

Fraudulent check prevention also involves some distinct measures. They are as follows:

1. Any policy that is established should be respected. It must be followed at all times unless management specifically authorizes otherwise.

2. Each check should always be checked carefully noting items such as:

    -signature
    -written amount of check
    -other forms of identification
    -check number

3. Store management should consider a specific system to prevent fraudulent checks including using a check validation service.

OPERATIONS AND CONTROL

Buyer Beware, Joshua Tree Productions, Westinghouse Learning Corp., 2208220, 100 Park Avenue, New York, NY 10017.

This is Fraud, Film Fair Communications, 10900 Ventura Blvd., Studio City, CA 91604.

"Legal Developments in Marketing," Ray Werner, _Journal of Marketing_, Summer, 1983, pp. 113-121.

"Legal Developments in Marketing," Ray Werner, _Journal of Marketing_, Winter, 1984, pp. 117-125.

"Legal Developments in Marketing," Ray Werner, _Journal of Marketing_, Spring, 1984, pp. 78-87.

"Marketing Product Liability: A Review and Update," Fred W. Morgan, _Journal of Marketing_, Summer, 1982, pp. 69-79.

Introduction

Processes Involved in Buying for Resale

An earlier edition of the Curricula Guidelines for D.E. stated the objectives of this unit as follows:

1). To develop the competencies required in fundamental mathematical operations,
2). To develop a working knowledge and understanding of a retail wholesale buyer's duties and of pricing policies and procedures,
3). To provide practical experience in making buying decision, and an understanding of pricing policies and procedures, and
4). To provide knowledge of market research and develop an appreciation for its importance in marketing.

These goals are well-stated and simply could not be added to.

Students will be required to perform simple mathematical functions all of their lives. In the business setting, they will find mathematics continually used. In the buying and ordering process such functions will likewise be required. Of course, buying and ordering are linked inextricably to be other functions of marketing. Similarly, pricing and market research should be mastered because of their importance in the buying-resale operations of the business enterprise.

UNIT: PROCESSES INVOLVED IN BUYING FOR RESALE

TOPIC: Merchandising Mathematics

Performance Objective(s)	Outline	Occupations	Resources
A. Each student will become aware of the careers related to buying for resale.		ALL	
B. Each student will be able to compute fundamental mathematical problems related to marketing occupations.	B-1 Review of fundamental skills a. Addition b. Making change c. Subtraction d. Multiplication e. Division f. Fractions g. Decimals h. Percentage i. Aliquot parts j. Weight and measures	ALL	1. Arithmetic for Distribution, D.E. Dept, University of Texas; Units I-XVI. 2. Mathematics Skill Builder, 3rd Ed., Gossage and Briggs; Southwestern Publishing Co., Section I. 3. Basic Math of Distribution, Liston and Luter; Inst. Materials Lab, D.E. Dept., Div. of Extension, University of Texas, Units II and III. 4. Projects in Clerical Record Keeping, 3rd Ed., Rosenburg; Southwestern Publishing Co., pp. 1-40. 5. Mathematics in Marketing, Logan & Freeman; Gregg, McGraw-Hill, pp. 1-20. 6. Vocational Math for Business, 2nd Ed., Martinka, Southwestern Publishing Co., pp. 1-40.

UNIT: PROCESSES INVOLVED IN BUYING FOR RESALE

TOPIC: Merchandising Mathematics (Continued)

Performance Objective(s)	Outline	Occupations	Resources
C. Each student will be able to identify and describe the use of various business forms prevalent in today's marketing occupations.	C-1 Sales slip C-2 Purchase orders C-3 Discounts C-4 Invoices C-5 Cash register records C-6 Credit memos C-7 Statements C-8 Employee earnings records C-9 Purchase requisitions C-10 Packing slips	ALL	1. Merchandising Mathematics, Piper; Southwestern Publishing Co., 1967; Parts I, II, and III. 2. Merchandising Mathematics, Carlo and Murphy; Delmar Publishing Co., 1981. 3. Mathematics Skill Builder, 3rd Ed., Gossage and Briggs; Southwestern Publishing Co., Section 4. 4. Mathematics in Marketing, Logan & Freeman; Gregg, McGraw-Hill, pp. 21-44.
D. Each student involved in insurance sales will be able to perform the duties and services required by that occupation.	D-1 Instructor will design individual tasks	8	1. Task analysis prepared by Instructor.

UNIT: PROCESSES INVOLVED IN BUYING FOR RESALE

TOPIC: Buying and Ordering

Performance Objective(s)	Outline	Occupations	Resources
A. Each student will be able to identify and explain the sources of information that buyers use in the selection and buying of merchandise.	A-1 Past sales records (EDP) A-2 Consumer panels A-3 Want slips A-4 Comparison shopping A-5 Customer surveys A-6 Trade journals A-7 Trade shows A-8 Manufacturer representatives A-9 Resident buying offices	15,16,17,18	1. Marketing and Distribution, Mason and Rath; McGraw-Hill Book Co., 1968; Chapter 15. 2. Retail Buying, Diamond & Pintel, Prentice Hall. 3. Retail Buying and Merchandising: A Decision-Making Approach, Shuck; Little, Brown & Company.
B. Each student will be able to explain the process of analyzing the market, what it has to offer, and its relationship to various store-buying policies.	B-1 Store policy in relation to what to buy B-2 Market offerings in relation to customer demand B-3 Subscriptions to trade services B-4 Use of trade papers B-5 Attendance at buyer's markets B-6 Discussions with visiting salesmen B-7 Promotional and sales support services	15,16,17,18	1. Retail Merchandising: Concepts and Applications, 9th Ed., Samson, Little & Wingate; Southwestern Publishing Co. 2. The Management of Retail Buying, Wingate and Friedlander; Southwestern Publishing Co. 3. Modern Retailing Management, 9th Ed., Duncan & Hollander; Richard D. Druin, Inc., pp. 302-324.

UNIT: PROCESSES INVOLVED IN BUYING FOR RESALE

TOPIC: Buying and Ordering (Continued)

Performance Objective(s)	Outline	Occupations	Resources
C. Each student will be able to explain the process of determining what, how much, and when to buy, and be able to define associated buying terms.	C-1 What to buy a. Price lines b. Fashion and fashion cycle c. Staple goods d. Branded vs private brands e. Buying plans f. Planned purchases and open-to-buy C-2 How much to buy a. Control of quantity stock to sales ratio b. Model stocks C-3 Time to buy a. Time utility b. Immediate needs c. Hand-to-mouth buying d. Buying-selling cycle e. Future needs f. Special opportunities and deals g. Buying arrangements h. Anticipated future needs i. Seasonal factors	15,16,17,18	1. Marketing: Basic Concepts and Decisions, 2nd Ed., Pride and Ferrell; Houghton Mifflin Company. 2. Marketing Principles, Nickels; Prentice Hall. 3. Marketing Analysis and Decision Making, Marcus and Tauber; Little, Brown and Company. 4. Pricing Decisions in Small Business, Haynes; Greenwood Publishing Co. 5. Modern Retailing Management, 9th Ed., Duncan & Hollander; Richard D. Druin, Inc., pp. 283-301.

UNIT: PROCESSES INVOLVED IN BUYING FOR RESALE

TOPIC: Buying and Ordering (Continued)

Performance Objective(s)	Outline	Occupations	Resources
D. Each student will be able to define negotiation terms involved in buying and correctly work buying problems dealing with different negotiation terms and practices.	D-1 Buyer's discounts D-2 Shipping agreements D-3 Credit terms D-4 Price knowledge D-5 Billing terms (dating) D-6 Special buying services a. Return privileges b. Back ordering c. Dealer aids d. Fairness in handling complaints e. Merchandise deals	15,16,17,18	1. Retail Merchandising: Concepts and Applications, 9th Ed., Samson, Little & Wingate; Southwestern Publishing Co., pp. 247-256, pp. 257-264. 2. Modern Retailing Management, 9th Ed.; Duncan & Hollander; Richard D. Druin, Inc., pp. 325-348. 3. Modern Retailing: Theory and Practice, Mason & Mayer; Business Publications Inc., pp. 414-37.
E. Each student involved in a particular occupation as coded will be able to perform the duties and services required by that occupation.	E-1 Instructor will develop appropriate task analysis for buying and ordering	6,10,12,13, 15,16,17, 18	1. Task analysis designed by instructor.

UNIT: PROCESSES INVOLVED IN BUYING FOR RESALE

TOPIC: Pricing

Performance Objective(s)	Outline	Occupations	Resources
A. Each student will be able to identify the factors considered by the buyer in determining the retail price and identify the pricing techniques that would result in the largest volume of sales for each article.	A-1 Pricing policies or strategies A-2 Deciding on the price A-3 Discounts A-4 Markup A-5 Markdown A-6 Leaders and premium merchandising A-7 Organization of the buying and pricing functions	1,6,9,10,15 16,17	1. Retail Merchandising: Concepts and Applications, 9th Ed., Samson, Little & Wingate; Southwestern Publishing Co., pp. 257-275. 2. Modern Retailing: Theory and Practice, Mason & Mayer; Business Publications Inc., pp. 382-413. 3. Retailing, Buskirk & Buskirk, McGraw-Hill; pp. 251-262. 4. Fundamentals of Selling, 9th Ed., Wingat & Nolan; Southwestern Publishing Co., Chapter 7, Part B 5. The Pricing Umbrella, Everhardt; Montana D.E. Library.
B. Each student will be able to identify and explain the legislation established to regulate prices.	B-1 Price discrimination laws B-2 Resale price maintenance laws a. Fair trade laws b. Unfair practices laws B-3 Antitrust laws	1,6,9,10,15, 16,17	1. Retailing, Buskirk & Buskirk, McGraw-Hill, pp. 263-264. 2. Fundamentals of Selling, 9th Ed., Wingat and Nolan; Southwestern Publishing Co., 1969; Chapter 16, Part E. 3. Retailing, Buskirk & Buskirk, McGraw-Hill, pp. 230-251.

UNIT: PROCESSES INVOLVED IN BUYING FOR RESALE

TOPIC: Market Research

Performance Objective(s)	Outline	Occupations	Resources
A. Each student will be able to explain the relationship of market research to the decision-making process.	A-1 Definition of market research A-2 Scientific decision-making process A-3 Different marketing problems that can be solved through market research A-4 The role of research in making decisions A-5 Uses of information gathered A-6 Steps in the market research process	7,15	1. Marketing and Distribution, Mason and Rath; McGraw-Hill Book Co., 1968; Chapter 20. 2. Marketing Research, Harris; McGraw-Hill Book Co., 1969; Chapter 1. 3. Research for Marketing Decisions, 4th Ed., Green & Tull; Prentice Hall, Inc., pp. 3-33.
B. Each student will be able to define the various market research activities and explain what each is used for.	B-1 Market analysis B-2 Sales research B-3 Consumer research B-4 Promotional research	7,15	1. Marketing and Distribution, Mason and Rath; McGraw-Hill Book Co., 1968; Chapter 20.
C. Each student will be able to describe the various methods of gathering data to be used in market research.	C-1 Methods of gathering data a. Secondary data b. Primary data C-2 Resources available C-3 Professional research organizations (commercial data)	7,15	1. Marketing Research, Harris; McGraw-Hill Book Co., 1969; Chapter 3 and 4. 2. Marketing and Distribution, Mason and Rath; McGraw-Hill Book Co., 1968; Chapter 21.

UNIT: PROCESSES INVOLVED IN BUYING FOR RESALE

TOPIC: Market Research (Continued)

Performance Objective(s)	Outline	Occupations	Resources
D. Each student will be able to identify the processes involved in preparing and presenting the research report.	D-1 Edit, code and tabulate data D-2 Analyze and interpret data D-3 Prepare report and present project result D-4 Make necessary conclusions and recommendations from data gathered	7,15	1. Marketing Research, 2nd Ed., Harris; McGraw-Hill Book Co. 2. Marketing and Distribution, Mason and Rath; McGraw-Hill Book Co., 1968; Chapter 22.
E. Each student will be able to identify market research projects.	E-1 Definition of studies in marketing manual E-2 Definition of creative marketing project	ALL	1. Marketing Research, 2nd Ed., Harris; McGraw-Hill Book Co., 1969; Chapter 8. 2. National DECA Handbook. 3. Marketing and Distribution, Mason and Rath; McGraw-Hill Book Co., 1968; pp. 253-254.

Introduction

Merchandise Handling

Everyone knows that the operational procedures that go on "behind the scenes" often is what makes a successful enterprise click. No where is this more true than in the business world. Basic to any business enterprise are: receiving goods and supplies, stocking, inventory control, shipping and delivery and safety procedures. Suitable OJT should teach these skills to students but classroom coordinated teaching is critical to sound training in this area. Are you as the marketing educator thoroughly familiar with merchandise handling procedures in a variety of business so as to bring this subject alive for your D.E. students?

The material presented in this unit should provide you with the basics of Merchandise Handling to present to students.

UNIT: MERCHANDISE HANDLING

TOPIC: Receiving Goods and Supplies

Performance Objective(s)	Outline	Occupations	Resources
A. Each student will become aware of the careers related to merchandise handling.		ALL	
B. The student will explain the proper procedures used in receiving merchandise.	B-1 Receipt of merchandise	5,10,13,18, 17,4	1. Retail Merchandising: Concepts and Applications, 9th Ed., Samson, Little & Wingate; Southwestern Publishing Co., pp. 415-426. 2. Receiving-Checking-Marking-Stocking Clerk, Miller, 2nd Ed., McGraw-Hill. 3. Receiving Controls, Ohio D.E. Materials Lab., pp. 3-14. 4. Receiving, Checking and Marking, Univ. of Texas D.E. Instructional Materials Lab., pp. 17-44. 5. Retailing: Principles and Practices, 7th Ed., Mever, Haines & Harris, Gregg McGraw-Hill; pp. 136-144. 6. Modern Retailing Management, 9th Ed., Duncan & Hollander; Richard D. Druin, Inc., pp. 375-380.
	B-2 Records and identification	5,6,13,15, 16	
	B-3 Inspection of freight	5,11,13,15, 4	
	B-4 Unpacking and checking in freight using invoice and buyer's order	5,13,15	
	B-5 Physical inspection of merchandise	5,11,13,15, 16	
	B-6 Claims and adjustments	5,6,13,15	
C. The student will explain the importance of marking merchandise and apply the various techniques of marking and coding price tickets.	C-1 Principles of marking a. Inventory control b. Correct pricing	6,10,15,16, 17	1. Retail Merchandising: Concepts and Applications, 9th Ed., Samson, Little & Wingate; Southwestern Publishing Co., 2. Retail Management: A Strategic Approach, Berman & Evans; Macmillan Publishing Co., p. 301. 3. Retailing: Principles and Practices, 7th Ed., Meyer, Haines & Harris, Gregg McGraw-Hill; pp. 145-152.
	C-2 Price ticket informa-	6,10,17	
	C-3 Methods of marking	6,9,10,17	
	C-4 Marking equipment	6,10,17	
	C-5 Remarking merchandise	6,10,15,16, 17	

UNIT: MERCHANDISE HANDLING

TOPIC: Receiving Goods and Supplies (Continued)

Performance Objective(s)	Outline	Occupations	Resources
	C-6 Marking trends		4. Modern Retailing Management, 9th Ed., Duncan & Hollander; Richard D. Druin, Inc., pp. 380-389. 5. Receiving Controls, Ohio D.E. Materials Lab., pp. 15-25. 6. Stockkeeping, University of Texas D.E. Instructional Materials Lab., pp. 40-43 7. Receiving, Checking and Marking, Univ. of Texas D.E. Instructional Materials Lab., pp. 47-63.

UNIT: MERCHANDISE HANDLING

TOPIC: Stocking

Performance Objective(s)	Outline	Occupations	Resources
A. The student will be able to explain the importance of the stockkeeper's role in merchandising and methods involved in proper stockkeeping.	A-1 Stockkeeper's role in merchandising	6,14,16,18	1. Modern Retailing Management, 9th Ed., Duncan & Hollander; Richard D. Druin, Inc., pp. 372-375. 2. Retail Merchandising: Concepts and Applications, 9th Ed., Samson, Little & Wingate; Southwestern Publishing Co., pp. 437-440. 3. Retailing, Buskirk & Buskirk, McGraw-Hill; pp. 277-282. 4. Stockkeeping, University of Texas D.E. Instructional Materials Lab., pp. 45-50, 83-111. 5. Warehouse Operations, General Services Admin., Federal Supply Service; Feb. 1969, pp. 32-80. 6. Fundamentals of Modern Marketing, 2nd Ed., Cundiff, Still and Govoni, Prentice Hall; pp. 282-85.
	A-2 Responsibilities of the stockkeeper	1,2,6,14,16,18	
	A-3 Stockroom location and arrangement	6,10,14,16,17,18	
	A-4 Maintaining and rotating merchandise inventory	1,2,9,10,14,16,17,18	

UNIT: MERCHANDISE HANDLING

TOPIC: Inventory Control

Performance Objective(s)	Outline	Occupations	Resources
A. The student will be able to list and explain the five main types of stock control systems.	A-1 Control by supervision	10,11,15, 16	1. Retail Merchandising: Concepts and Applications, 9th Ed., Samson, Little & Wingate; Southwestern Publishing, pp. 444-449, 470-478. 2. Retailing, Buskirk & Buskirk, McGraw-Hill; pp. 188-207. 3. Stockkeeping, University of Texas D.E. Instructional Materials Lab., pp. 61-82
	A-2 Book control inventory	12,12,15, 16	
	A-3 Periodic inventory control	5,6,15, 16	
	A-4 Model or basic stock control	12,15	
	A-5 Perpetual inventory control	5,6,15,18	
	A-6 Trends in inventory control (U.P.C.,etc)		

UNIT: MERCHANDISE HANDLING

TOPIC: Shipping and Delivery

Performance Objective(s)	Outline	Occupations	Resources
A. The student will be able to outline the procedures in shipping merchandise.	A-1 Packing and labeling A-2 Records A-3 Transportation methods A-4 Insurance	4,13,15 4,13,15 4,5,13,15	1. Retail Merchandising: Concepts and Applications, 9th Ed., Samson, Little & Wingate; Southwestern Publishing Co., pp. 425-26. 2. Warehouse Operations, General Services Admin., Federal Supply Service; Feb. 1969, pp. 93-113. 3. Physical Distribution, Walsh; McGraw-Hill Book Co., Gregg Division.

UNIT: MERCHANDISE HANDLING

TOPIC: Safety

Performance Objective(s)	Outline	Occupations	Resources
A. The student will be able to explain the importance of safety practices in merchandise handling.	A-1 Personal safety (Occupational Safety and Health Act) A-2 Protection of merchandise A-3 Equipment and tool maintenance and safety A-4 Risk and insurance considerations	5,11,18 5 5,10,12,13, 16,18,11	1. Retail Merchandising: Concepts and Applications, 9th Ed., Samson, Little & Wingate; Southwestern Publishing Co., pp. 412-414. 2. Receiving-Checking-Marking-Stocking Clerk, Miller, 2nd Ed.,; McGraw-Hill. 3. Receiving, Checking and Marking, Univ. of Texas D.E. Instructional Materials Lab., pp. 7-14. 4. Stockkeeping, University of Texas D.E. Instructional Materials Lab, pp 113-142 5. Warehouse Operations, General Services Admin., Federal Supply Service; Feb. 1969, pp. 157-161. 6. Occupational Safety and Health Act; Available through U.S. Dept of Labor, Petroleum Bldg, Suite 525, Billings, MT 59101; Phone: 657-6649.

I. RELATED CASE STUDY: Merchandise Handling

II. CASE TITLE: Evaluating Consumer Demand

III. SUGGESTED GRADE LEVEL: Senior

IV. CASE OBJECTIVES: The purpose of this case study is to acquaint students with the dynamics of consumer demand as it applies to merchandise in the selling department. At the conclusion of this case study students will be able to:

1. Understand the importance of depth of stock in required merchandise.
2. Understand that the buyer must be kept informed of low quantity points of staple stocks.
3. Know the reasons for making returns of merchandise to manufacturers.
4. Understand that complete assortments of merchandise must be maintained at all times in order to stimulate sales.

V. CASE DESCRIPTION: After a recent buying trip to Denver, John Andersen excitably came back to his department store bragging about the newest purchase of Hawaiian open neck shirts. These were the rage of the country in California, John reported and he was completely convinced that this would be the rage of the season in Montana.

The first order was scheduled for delivery on April 10, and was to come in a wide assortment of colors and designs. However, Mrs. Johnson, the general manager was concerned that the item would not be as hot an item as John thought they would be. She demanded, in effect, that the items should be test marketed in a small quantity first to see if the demand would be warranted for the Hawaiian shirts. At the end of the first week it was found that only two shirts had been ordered out of the four dozen that had been ordered.

John still firmly believed that the shirts would sell and once the warm summer months came around the immediate stock would be depleted and therefore would need to be reordered; so John went ahead and reordered a full shipment. The shipment was expected around the third week of June or toward the middle of July and had a three week cancellation date from the time of purchase.

Four days later the general manager reported to John that he had overbought causing a shortage in basic stock in the backroom. He was of course upset and demanded that John take care of the situation in some manner right away. What would you suggest that John do in order to return his stock to normal?

VI. SUGGESTED SOLUTION (S): The following possibilities could be pursued by John Andersen:

1. He could offer the shirts on hand at special discount price. This would get him off the hook with his immediate stock and would also be a good buy for the consumer.

2. Since the cancellation period is normally time to three weeks, the privilege of cancelling could be taken. With the extra money, John could then purchase the needed basic stock.
3. If John truly feels strongly about the Hawaiian shirts, perhaps, several advertisments that brought them to the attention of the consumer would help to sell the present merchandise and to determine whether or not there is a demand for the additional merchandise.
4. Perhaps all of the employees have not been informed of the Hawaiian shirts and the special attraction that they have to them. Therefore, special sales training could be undertaken to acquaint personnel with the Hawaiian shirts.

I. RELATED CASE STUDY: Merchandise Handling

II. CASE TITLE: Being Honest with the Customer

III. SUGGESTED GRADE LEVEL: Junior

IV. CASE OBJECTIVES: The purpose of this case study is to acquaint students with the importance of stockkeeping, errors or losses affecting company profit. At the conclusion of this case, students will be able to:

1. Understand the procedures for recording mark-ups, mark-downs, additional mark-ups and revision of retail down.

2. Know the store's methods and procedures for changing retail stock problems.

3. Understand that stocking errors affect company profit.

V. CASE DESCRIPTION: Mr. Simpson entered your electric rewind shop one morning in order to purchase three new two-horse power motors. Mr. Simpson has always done his business with your shop since he is assured that he will get personal service for any problems that may happen to the electric motors. He also knows that you will give him the most reasonable price for his motors.

After looking over the merchandise in stock, Mr. Simpson decides to purchase two two-horse power motors and one one-horse power motor. The two-horse power motors were motors that you had on sale for $146 while the one-horse power motor was not on sale and costs $56. The total bill came to $200. Mr. Simpson placed the order and requested that the motors be delivered to his business the next day.

Several hours after Mr. Simpson left the store it was discovered that the two-horse power motors were supposed to be on sale for $125. Apparently it was an oversight from a previous sale week and the price tags had not been changed accordingly. Do you believe that the manager should do anything to correct this situation?

VI. SUGGESTED SOLUTION (S): The manager has several options in this situation. Although he is not forced to change the prices, the manager should alter the mistake if it is at all possible. More than likely Mr. Simpson will never know the two motors were on sale. However, the possibility still exists. Therefore the store manager would want to consider two courses of action:

1. The manager could contact Mr. Simpson and explain the error and tell him that the change of billing will be credited to his account. Of course, Mr. Simpson will appreciate this service and will most likely continue as a loyal customer.

2. Another possibility would be to give Mr. Simpson a credit slip for the amount of difference which he could then apply on a future purchase.

Introduction

Sales Promotion

Take a trip to any major shopping mall or tour downtown businesses and you will find materials, foods, products, etc. all at varying levels of attractive displays. Department stores will concentrate more on display than, say, a hardware store, but each recognizes that if the customer cannot see the merchandise displayed, he/she is very unlikely to buy it. Similarly, advertising and promotion are central to the image a business wishes to portray to the public about itself, its products or its services. Sales Promotion, in effect, is critically important to a business operation.

How well do your students understand the dynamics of Sales Promotion? The accompanying unit, resources and case studies will provide you with materials to bring this area alive for your D.E. students.

UNIT: SALES PROMOTION

TOPIC: Display

Performance Objective(s)	Outline	Occupations	Resources
A. Each student will become aware of the careers related to sales promotion.		ALL	
B. Each student will be able to define visual merchandising and list and describe the major types of displays.	B-1 Definition of visual merchandising B-2 Major types of display a. Promotional b. Institutional	10,11,12, 16,17	1. Display and Promotion, Gary R. Smith; McGraw-Hill Book Co., Chapter 2. 2. Retail Merchandising: Concepts and Applications, 9th Ed., Samson, Little & Wingate; Southwestern Publishing Co., pp. 317-325.
C. Each student will be able to list and explain the elements of design.	C-1 Lines C-2 Shape C-3 Size C-4 Texture C-5 Weight C-6 Color	10,11,12, 16,17	1. Retail Merchandising: Concepts and Applications, 9th Ed., Samson, Little & Wingate; Southwestern Publishing Co., pp. 327-330. 2. Display and Promotion, Gary R. Smith; McGraw-Hill Book Co., Chapter 4.
D. Each student will be able to list the principles of arrangement and display.	D-1 Balance D-2 Proportion D-3 Harmony D-4 Rhythm D-5 Emphasis D-6 Contrast	10,11,12, 16,17	1. Retail Merchandising: Concepts and Applications, 9th Ed., Samson, Little & Wingate; Southwestern Publishing Co.; pp. 330-334. 2. Display and Promotion, Gary R. Smith; McGraw-Hill Book Co., Chapter 5.
E. Each student will be able to discuss the importance and kinds of window displays.	E-1 Importance of window displays E-2 Kinds of window displays	10,11,12, 17	1. Retail Merchandising: Concepts and Applications, 9th Ed., Samson, Little & Wingate; Southwestern Publishing Co., pp. 318-320. 2. Advertising and Displaying Merchandise, Harland E. Samson; Southwestern Publishing Co., Section VI.

UNIT: SALES PROMOTION

TOPIC: Display (Continued)

Performance Objective(s)	Outline	Occupations	Resources
F. Each student will be able to list and describe the uses of the kinds of interior displays and draw store layout plans showing the most effective location of displays.	F-1 Types of interior displays F-2 Goods for interior displays F-3 How to display F-4 Display location F-5 Store layout	10,11,12, 16,17	1. Retail Merchandising: Concepts and Applications, 9th Ed., Samson, Little & Wingate; Southwestern Publishing Co., pp. 321-324. 2. Advertising and Displaying Merchandise, Harland E. Samson; Southwestern Publishing Co.
G. Each student will be able to draw plans and construct an effective display.	G-1 Planning the display G-2 Sketches G-3 Merchandise selection G-4 Prop selection G-5 Mannequins and forms G-6 Signs and show cards G-7 Building the display	10,11,12, 16,17	1. Display and Promotion, Gary R. Smith; McGraw-Hill Book Co., Chapter 6. 2. Retail Merchandising: Concepts and Applications, 9th Ed., Samson, Little & Wingate; Southwestern Publishing Co., pp. 338-350.
H. Each student will be able to plan a sales promotion campaign.	H-1 Planning a sales promotion campaign	17	1. Advertising and Displaying Merchandise, Harland E. Samson; Southwestern Publishing Co., Section II.

UNIT: SALES PROMOTION

TOPIC: Advertising

Performance Objective(s)	Outline	Occupations	Resources
A. Each student will be able to explain the categories of advertising.	A-1 Classification of advertising a. National b. Regional c. Local A-2 Classification of audience a. Consumer b. Industry c. Business d. Professional A-3 Advertising types a. Promotional b. Institutional	7,8,9,12, 16,17,18	1. Advertising, 5th Ed., Wright, Winter & Ziegler; McGraw-Hill; pp.1-5 2. Advertising, William H. Antrim & Dorr; McGraw-Hill Book Co. 3. Advertising in the Market Place, Burke; McGraw-Hill Book Co.
B. Each student will be able to list advertising media and discuss the advantages and disadvantages of each.	B-1 Newspaper B-2 Broadcast B-3 Magazines B-4 Outdoor B-5 Direct mail B-6 Miscellaneous	7,8,9,12, 16,17,18	1. Advertising, 5th Ed., Wright, Winter & Ziegler; McGraw-Hill; pp. 128-189. 2. Advertising, Antrim and Dorr; McGraw-Hill Book Co.
C. Each student will be able to create an effective newspaper ad.	C-1 Headline C-2 Copy C-3 Illustration C-4 Logotype C-5 White space C-6 Border	7,17,18	1. Advertising: Its Role in the Marketplace 4th Ed., Holt, Rinehart & Winston; pp. 360-391. 2. Advertising, Antrim and Dorr; McGraw-Hill Book Co., Chapters 3 and 4. 3. Merchandising, 2nd Ed., Dorr; McGraw-Hill Book Co., Section III.

UNIT: SALES PROMOTION

TOPIC: Advertising (Continued)

Performance Objective(s)	Outline	Occupations	Resources
D. Each student will be able to create and produce a spot announcement for broadcast.	D-1 Copy D-2 Sound effects and props D-3 Tape production	7	1. Advertising, Norris; Reston Publishing Co., pp. 225-236. 2. Advertising, 5th Ed., Wright, Winter & Ziegler; McGraw-Hill, pp. 144-45. 3. Advertising: Its Role in the Marketplace 4th Ed., Holt, Rinehart & Winston, p. 590-98. 4. Advertising and Displaying Merchandise, Harland E. Samson; Southwestern Publishing Co., pp. 45-49.
E. Each student will be able to prepare direct mail advertising.	E-1 Material types E-2 Mailing lists E-3 Material preparation E-4 Distribution	7,8	1. Advertising, Antrim & Dorr; McGraw-Hill Book Co., Chapter 5. 2. Advertising and Displaying Merchandise, Harland E. Samson; Southwestern Publishing Co., pp. 36-44.

UNIT: SALES PROMOTION

TOPIC: Promotion

Performance Objective(s)	Outline	Occupations	Resources
A. Each student will be able to explain sales promotion.	A-1 Definition of sales promotion A-2 Importance of sales promotion A-3 Relationship of advertising, display, and personal selling A-4 The role of publicity relations in sales promotion A-5 Trends in advertising and display	10,12,13, 15,16,17, 18	1. Advertising and Displaying Merchandise, Harland E. Samson; Southwestern Publishing Co., Section I. 2. Display and Promotion, Smith & Dorr, McGraw-Hill Book Co. 3. The Businessman's Guide to Advertising and Sales Promotion, Lewis; McGraw-Hill Book Co.

I. RELATED CASE STUDY: Sales Promotion - Display

II. CASE TITLE: Display Merchandise Effectively

III. SUGGESTED GRADE LEVEL: Junior

IV. CASE OBJECTIVES: The purpose of this case study is to acquaint students with the importance of arranging displays of merchandise and knowing the specifics of color, harmony, balance and proportion in display construction. At the conclusion of this case study students will be able to:

1. Construct a display that is true to the principles of color, harmony, balance and proportion.

2. Possess skill in arranging counter displays of merchandise.

3. Know the arrangements that are best for advertising merchandise on tables or shelves.

V. CASE DESCRIPTION: Shapiro's, a very exclusive department store, has been long recognized for its outstanding displays. In fact, Shapiro's has won a number of awards for attractive interior displays and is widely regarded withing the industry as being a clothing store that has state-of-the-art equipment in the display area. Displays are changed each Tuesday and Thursday by several people who have worked with the company for a long period of time.

One morning as you are working in the Junior department, word was sent to you that Mr. Anderson, the head of the display area, wanted you to come to his office for a new assignment. Upon your arrival he explained that the person who had been doing the displays had requested that you fill in for him. He states that you are an employee who could eventually learn the basics of interior display. Mr. Anderson indicated that he thought you have the unique talents to prepare displays and would like to have you put together the men's display area to complement the ad in tomorrow's paper.

You have been given five items to use in your display to complement the advertisment. Only use what you feel will truly aid the display. Some articles may be eliminated. Color, balance, harmony, proportion and rhythm must be decided upon by you.

Items for display: sport shirts, shorts, slacks, sport coats and shoes. The ad headline reads: "Start Your Vacation With a Trip to Shapiro's Today".

VI. SUGGESTED SOLUTION (S):

1. The display should indicate a tie in with the advertising theme placed in the newspaper and the items listed in the newspaper.

2. The display does not necessarily need to use all the items that were outlined in the ad.

3. The display should feature interchangeable colors in order for the customer to envision a number of different outfits.

I. RELATED CASE STUDY: Promotion - Display

II. CASE TITLE: The Importance of Displaying Merchandise

III. SUGGESTED GRADE LEVEL: Senior

IV. CASE OBJECTIVES: The purpose of this case study is to prepare students for preparing and selling the idea of displays. At the conclusion of this case study students will be able to:

1. Possess skills in using color, harmony, balance and proportion in display construction.

2. Understand that good display merchandise is a prime factor in developing a customer's interest.

3. Understand the importance of color in the customer's acceptance of merchandise.

4. Know that customer exposure to attractively displayed merchandise produces additional sales.

V. CASE DESCRIPTION: You are working as a part-time employee in a small sporting goods store. You have often thought of the possibility of owning your own store and sometimes you've imagined this store as being very much like the one you would like to own. Recently you noticed some changes that you would like to make. Today is your opportunity.

Since the store has never had a professional display person, employees have always done the various displays. Today the manager has asked you if you would be in charge of all the display materials in the store over the next three weeks. This includes end-of-the-aisle displays, window displays, point of purchases displays and other areas as you deem appropriate. In thinking about and ultimately constructing these displays, what would you consider and how would you convince your manager that displays really are more important than he/she thinks?

VI. SUGGESTED SOLUTION (S):

1. There are at least three things that you should stress relative to the importance of displaying merchandise to your manager:

   a. The more merchandise that is displayed, the more sales that should be produced.
   b. Displays help build customer good-will toward the store.
   c. Effective displays effectively arouse the customer's initial interest in the merchandise.

2. Be sure to use color in an effective way. When you arrange a display, be sure that the color is eye catching and appealing. Be sure that the display has balance and is in the right proportion to the display area.

3. Stress to the manager that it is important to have a person doing displays who has a good background and therefore knows how to effectively build one.

4. Draw up rough sketches of the displays before actually building them. Be sure to elicit comments from others about the appropriateness of ideas regarding the displays.

Additional Resources

SALES PROMOTION: DISPLAY

State of the Art in Merchandise Display: Slide Presentation by Dr. Ron Harris.

"Shampoos and Conditioners," Glenn Snyder, Progressive Grocer, August, 1983, pp. 61-64.

"How to Create Tempting Sales Promotions," Sales and Marketing Management, Rayna Skolnik, March 12, 1983, pp. 41-46.

"The Bigger The Better," Ronald Tanner, Progressive Grocer, January, 1984, pp. 61-64.

"Store of the Near Future," Gerald Lewis, Progressive Grocer, January, 1984, pp. 48-59.

"Safeway Sells Its Peanut Butter by the Barrel," Sales and Marketing Management, December 5, 1983, pp. 21-22.

Additional Resources

SALES PROMOTION: ADVERTISING

The Buy Line, Film Fair Communications, 10900 Ventura Boulevard, Studio City, CA 91604.

Sixty Second Spot, Pyramid Films, Box 1948, Santa Monica, CA 80406.

Advertising Principles: Creating the Advertisement, Buyer Behavior, Marketing Research, Walsh-Carpenters, Gregg McGraw-Hill, New York, NY.

"Advertising In the Great Outdoors," Bill Wilkins, Progressive Grocer, August, 1983, pp. 123-128.

"The Advertiser's Bag of Tricks," Scholastic Voice, November 8, 1973.

"Negative Word of Mouth by Dissatisfied Consumers: A Pilot Study," Marshal L. Richins, Journal of Marketing, Winter, 1983, pp. 68-78.

"Viewer Miscomprehension of Televised Communication: Selected Findings," Jacob Jacoby and Wayne D. Hayer, Journal of Marketing, Fall, 1982, pp. 12-26.

"Using Background Music to Affect the Behavior of Supermarket Shoppers," Ronald E. Millinian, Journal of Marketing, Summer, 1982, pp. 86-91.

Sales Promotion: Advertising cont.

"Advertising Substantiation and Advertiser Response," John S. Healey and Harold H. Kassarjian, Journal of Marketing, Winter, 1983, pp. 107-117.

"The Sounds of Selling," Progressive Grocer, September, 1983, pp. 147-152.

"Marketings 'Scarlet Letter': The Theory and Practice of Corrective Advertising," Journal of Marketing, Spring, 1984, pp. 11-31.

Introduction

Sales & Services

The old maxim says: "Nothing happens until somebody sells somethings." Implied in this saying is that a sale must be made by a salesperson who knows about the product and then offers services related to it. That is the essence of this unit: product knowledge, sales and customer service.

Students will enjoy this section because it introduces them to the fascinating world of selling. Millions of men and women, young and old, have found this profession to be challenging and rewarding. Are your students able to grasp a vision of their future in sales as a result of your masterful handling of this challenging subject area?

The following material, resources and case studies should provide incentive for D. E. students to desire to master the Sales and Service area.

UNIT: SALES AND SERVICES

TOPIC: Product Knowledge

Performance Objective(s)	Outline	Occupations	Resources
A. Each student will become aware of the careers related to sales and service.		ALL	
B. Each student will be able to define selling and explain the role of sales personnel.	B-1 Definition of selling B-2 Role of sales personnel	ALL	1. Retail Merchandising: Concepts and Applications, 9th Ed., Samson, Little & Wingate; Southwestern Publishing Co.; pp. 352-358. 2. Retailing: Principles and Practices, 7th Ed., Meyer, Haines & Harris, Gregg McGraw-Hill; pp. 170-172, 178.
C. Each student will able to explain the importance of product information.	C-1 Importance to customer C-2 Importance to salesperson C-3 Importance to business	1,2,3,6-18	1. Marketing, 3rd Ed., Mason, Rath & Ross Gregg McGraw-Hill, pp. 338-340.
D. The student will be able to locate sources and identify types of product information.	D-1 People a. Management b. Co-workers c. Customers d. Manufacturer's representative e. Yourself (personal use) D-2 Literature a. Labels and tags b. Trade journals c. Consumer publications d. Mail order catalogs e. Store and competitive advertising	2,3,6-18	1. Retailing: Principles and Practices, 7th Ed., Meyer, Haines & Harris, Gregg McGraw-Hill, pp. 173-76. 2. Business Principles & Management, 7th Ed., Everhard & Shilt; Southwestern Publishing Co., pp. 188-190. 3. Guest Speaker-Salesperson.

UNIT: SALES AND SERVICES

TOPIC: Product Knowledge (Continued)

Performance Objective(s)	Outline	Occupations	Resources
	D-3 Types of product information a. What product is made of b. How product is made c. Serviceability and quality d. How product is used e. How to take care of product f. Appearance, style, and design of product g. History and background h. Competing products i. Stock condition (availability)		

UNIT: SALES AND SERVICES

TOPIC: Sales

Performance Objective(s)	Outline	Occupations	Resources
A. The student will be able to demonstrate the basic steps in a sale.	A-1 Preapproach A-2 Approach A-3 Determine customer needs A-4 Presentation a. Sales talk b. Trading up c. Demonstration A-5 Overcome objections A-6 Close A-7 Suggestive selling A-8 Post closing	1-3,6-18	1. Marketing, 3rd Ed., Mason, Rath & Ross, Gregg McGraw-Hill; pp. 346-356. 2. Retailing: Principles and Practices, 7th Ed., Meyer, Haines & Harris, Gregg McGraw-Hill; pp. 181-193. 3. Retail Merchandising: Concepts and Applications, 9th Ed., Samson, Little & Wingate; Southwestern Publishing Co.; pp. 367-395. 4. Retail Selling, Bodle & Corey; Gregg McGraw-Hill, pp. 230-284 5. Professional Selling, Brenman; Science Research Associates; pp. 137-226. 6. Personal Selling: Foundations Process and Management, Enis; Goodyear Publishing Co.; pp. 115-267. 7. Basic Sales Techniques; University of Texas, 1970 ed. 8. Basic Salesmanship, Ernest; McGraw-Hill Book Co., Gregg Division, Chapters 5-8. 9. Fundamentals of Selling, 9th Ed., Wingate & Nolan, Chapters 8-10.

UNIT: SALES AND SERVICES

TOPIC: Customer Service

Performance Objective(s)	Outline	Occupations	Resources
A. The student will be able to demonstrate the ability to handle customer returns and adjustments.	A-1 Customer returns A-2 Adjustments A-3 Policies and procedures	2,3,6-10, 12-18	1. Credit and Collections, Kohns; Southwestern Publishing Co., Sections 5 and 6. 2. Retail Merchandising: Concepts and Applications, 9th Ed., Samson, Little & Wingate, Southwestern Publishing Co., pp. 152-158.
B. The student will be able to utilize the telephone in handling sales and service.	B-1 Proper telephone usage B-2 Serving the customer	9,10,17	1. Retail Merchandising: Concepts and Applications, 9th Ed., Samson, Little & Wingate; Southwestern Publishing Co., pp. 193-94, 397-99. 2. Retailing: Principles and Practices, 7th Ed., Meyer, Haines & Harris, Gregg McGraw-Hill; pp. 68-69. 3. Tele-Techniques Mean Business, Guaring; Ohio State, pp. 12-38. 4. Mountain Bell Telephone Co.Film Library
C. The student will be able to use the telephone in soliciting sales.	C-1 Proper telephone usage C-2 Planning C-3 The call	7,8,13	1. Tele-Techniques Mean Business, Guaring; Ohio State, pp. 11-38. 2. Basic Sales Techniques; University of Texas, 1970 ed., Assignment 20. 3. Mountain Bell Telephone Co.

I. RELATED CASE STUDY: Advertising

II. CASE TITLE: Preparing Merchandise for Release of an Advertisement

III. SUGGESTED GRADE LEVEL: Junior-Senior

IV. CASE OBJECTIVES: The purpose of this case study is to prepare students for understanding that knowledge of merchandise advertised is an important dimension to their respective jobs. At the conclusion of this case students should be able to:

1. Understand the facts about merchandise being ordered such as as prices, brand, names, colors, styles and models to sell effectively.
2. Check available quantities of advertised merchandise before an ad is featured.
3. Construct procedures for checking and keeping track of incoming merchandise.

V. CASE DESCRIPTION: You have been working in an auto supply store for three months as a part-time Distributive Education student.

This afternoon, Jim Swenson, the store manager, took you into the back room and explained that twelve specific items will be featured in the next mass mailing to the community. You are given the responsibility of preparing the merchandise for the release of the ad. In one week, you are to report the information to him regarding the twelve items.

What actions should you pursue to do this task effectively?

VI. SUGGESTED SOLUTION (S):

1. Personally check all incoming merchandise, paying particular attention to the twelve items.
2. Record quantities, colors, etc. of each of the twelve items to be sure there are sufficient quantities on hand for the mainling.
3. Make sure that other employees know of the coming mass mailing, are familiar with the quantities, sizes, colors, etc. and where they are located.
4. Prepare displays for each of the items that will attractively highlight the twelve items. Be sure the items are easy to handle.
5. Make plans for extra employees to be working the first few days after the flyer is distributed.

I. RELATED CASE STUDY: Advertising

II. CASE TITLE: Knowing Advertised Products

III. SUGGESTED GRADE LEVEL: Junior

IV. CASE OBJECTIVES: It is critically important that salespeople know of advertised products. Since they form the link between advertised messages and the customer, they must be well prepared in selling the advertised product. By the conclusion of this unit, the student will be able to:

1. Correctly inform customers of the location of advertised merchandise.
2. Understand that advertising will help increase sales for a department or store, creating interest and desire in customers.
3. Know that the salesperson is ultimately responsible for the sale of the advertised merchandise.
4. Understand that advertising is a form of preselling--arousing interest, creating desire and inducing action--but that the salesperson must complete the sales job.
5. Know prices, colors, etc. in order to better promote and sell.
6. Understand the importance of displaying advertised merchandise.

V. CASE DESCRIPTION: You are working as a Distributive Education Co-op student at a small ladies shop in a mini-mall.

When you come to work, the floor traffic is very slow. You checked the ad board, but no ads were displayed. When you inquired about what was going on you got the reply "Nothing. Everything's the same as yesterday."

At close to closing time, when you were working alone, a customer comes in and asks about the special slacks advertised in the evening paper. Looking around for a special display, you found none. After checking the ad board again, you realize that the ad was definitely not posted. Since you do not know about the merchandise advertised, and the customer insists on purchasing the slacks that night, what do you do?

V. SUGGESTED SOLUTION (S):

1. Apologize to the customer for your unawareness (ignorance?) of the advertised merchandise.

2. With the customer's assistance, attempt to find the advertised item.

3. Inform others of the advertised slacks after the customer leaves.

4. See that a display is built as soon as possible to display the merchandise.

5. Realize that it is still your responsibility to find out about advertised merchandise. Call a manager immediately and find out what has been advertised.

Additional Resources

SALES & SERVICE: PRODUCT KNOWLEDGE & SALES

Serving and Selling the Problem Customer

Interviewing and Hiring Store Personnel

Larry Wilson, Personal Selling Kit, St. Louis, MO.

"What Made Supersalesman Dick DiBari Call it Quits?", Sales and Marketing Management, April 2, 1984, pp. 43-49.

"Selling Vaults to Olympian Heights," Liz Murphy, Labor and Marketing Management, October 10, 1983, pp. 57-58.

"Selling Like There's No Tomorrow," Steven Mintz, Sales and Marketing Management, August 10, 1982, pp. 37-39.

"A Coupon With You in Mind," Sales and Marketing Management, July 4, 1983, p. 18.

"Selling is Child's Play," Sales and Marketing Management, May 17, 1982, pp. 38-39.

"Test Marketing," Sales and Marketing Management, March 12, 1984, pp. 81-90.

1983 Guide to Product Usage," Progressive Grocer, pp. 31-35.

"SICBP: Your Manual on the Marketing Battlefield," Sales and Marketing Management, April 23, 1984, pp. 6-14.

SALES & SERVICE: CUSTOMER SERVICE

Customer Service in a Quick Service Store

"And Now, the Drive-In Supermarket," Sales and Marketing Management, September 12, 1983, p. 20.

"Let's Tuck Some of it Back In," Jane Templeton, Sales and Marketing Management, April 2, 1984, pp. 74-75.

Introduction

Management & Decision-Making

There is perhaps no more hotly contested area today than "Management & Decision-Making." Scores of books are published yearly on the subject of management. Do you believe in Theory X or Theory Y style of management? How is real management leadership developed? Is it possible for everyone to be a "One Minute Manager?" These and a score of other questions confront the student seeking to learn about management. Assisting the student in developing an understanding of the functions of management is what this unit is all about. By gaining an appreciation of what management does, students can become better employees. By excelling as an employee, they themselves become a candidate for future advancement.

The accompying unit on "Management & Decision-Making" is intended to cover the basics of management and provide you with resources that can be used in the classroom.

UNIT: MANAGEMENT AND DECISION MAKING

TOPIC: Management

Performance Objective(s)	Outline	Occupations	Resources
A. Each student will be able to describe the five primary functions of management, using definitions and basic explanations of each function.	A-1 Planning A-2 Organizing A-3 Staffing A-4 Directing A-5 Controlling	1,3,5,7,8,9 10,12,14 17,18	1. Business in Action, 2nd Ed., Bittal, Burke & LaForge; McGraw-Hill, pp.79-82. 2. Business Principles and Management, 5th Ed., Shilt/Carmichael/Wilson; Southwestern Publishing Co., pp. 81-90. 3. Retail Merchandising: Concepts and Applications, 9th Ed., Samson, Little & Wingate; Southwestern Publishing Co., pp. 537-545. 4. Marketing and Distribution, Mason and Rath; McGraw-Hill Book Co.; pp. 512-515 5. Dynamics of American Business, Justis; Prentice Hall Inc.; pp. 109-121.
B. Each student will be able to explain the need for communications within the functions	B-1 Communications flow B-2 Communication consequences	ALL	1. Marketing: Basic Concepts and Decisions 2nd Ed., Pride & Ferrell; Houghton Mifflin Co. 2. Marketing: An Integrated Approach; Harper and Row. 3. Business in Action, 2nd Ed., Bittal, Burke and LaForge; McGraw-Hill, pp. 390-91. 4. Dynamics of American Business, Justis; Prentice Hall Inc., 154-56.
C. Each student will be able to describe the phases of influence used by management to change employee attitudes.	C-1 Unfreezing: increasing the pressure or reducing resistance to change C-2 Changing: learning new attitudes C-3 Refreezing: setting new attitudes into the rest of the personality	ALL	1. Behavioral Concepts in Management, Hampton; McGraw-Hill; p. 106-113. (currently out of print, but still the only book that adequately covers this area.)

UNIT: MANAGEMENT AND DECISION MAKING

TOPIC: Management (Continued)

Performance Objective(s)	Outline	Occupations	Resources
D. Each student will be able to construct the decision making format and put it into practical use, using case problems.	D-1 Define the problem D-2 Form possible solutions D-3 Determine evidence for and against each one D-4 Select best solution and justify it	ALL	1. Business in Action, 2nd Ed., Bittal, Burke & LaForge; McGraw-Hill; pp. 353-54 2. Business Principles and Management, 5th Ed., Shilt/Carmichael/Wilson; Southwestern Publishing Co., pp.647-50. 3. New City Telephone Co., (Game) Library; Mountain Bell.
E. Each student will be able to describe the theories, problems, and trends in management.	E-1 Theories E-2 Problems E-3 Trends	ALL	1. Readings in Managerial Psychology, 3rd Ed., Leavitt and Pondy, 1964; pp. 447-56 2. Up the Organization, Robert Townsend.
F. Each student will be able to construct the managerial grid and graph and five management techniques on the grid. (Illustrates the relationship between concern for people and concern for production.)	F-1 Poor management F-2 Task management F-3 Country Club management F-4 Middle Road management F-5 Team management	1,3,5,7,8, 9,10,12,13, 14,17,18	1. Behavioral Concepts in Management, Hampton, McGraw-Hill; pp. 24-31. (currently out of print.)
G. Each student will be able to describe the seven leadership styles.	G-1 Democratic G-2 Mediator (free rein) G-3 Combination of autocratic and democratic G-4 Autocratic G-5 Charismatic G-7 Business statesman	1,3,5,7,8, 9,10,12,13, 14,17,18	1. Business in Action, 2nd Ed., Bittal, Burke & LaForge; McGraw-Hill; pp. 85-6. 2. Business Principles and Management, 5th Ed., Shilt/Carmichael/Wilson; Southwestern Publishing Co., pp. 426-428.

UNIT: MANAGEMENT AND DECISION MAKING

TOPIC: Management (Continued)

Performance Objective(s)	Outline	Occupations	Resources
H. Each student will be able to define the primary personnel management terms.	H-1 Selection H-2 Training H-3 Motivation H-4 Promotion	5,17,18	1. Dynamics of American Business, Justis; Prentice Hall Inc.; p. 149. 2. Business Principles and Management, 5th Ed., Shilt/Carmichael/Wilson; South-western Publishing Co., pp. 425,426,433. 3. Retail Merchandising: Concepts and Applications, 9th Ed., Samson, Little & Wingate; Southwestern Publishing Co., pp. 153-54.
I. Each student will be able to identify three major motivation theories.	I-1 Maslow I-2 Herzberg I-3 McGregor	ALL	1. Dynamics of American Business, Justis; Prentice Hall Inc.; pp. 147-52. 2. Business Principles and Management, 5th Ed., Shilt/Carmichael/Wilson; South-western Publishing Co., p. 432. 3. Management, 5th Ed., Flippo and Munsinger; Allyn and Bacon.
J. Each student will be able to describe how management provides the desired product or service (emphasis on the retail level.)	J-1 Define product or service J-2 Establish levels of output J-3 Promotion to move to the consumer	8,9,17, 18	1. Retail Merchandising: Concepts and Applications, 9th Ed., Samson, Little & Wingate; Southwestern Publishing Co., pp. 216-275. 2. Retailing, Buskirk & Buskirk, McGraw-Hill; pp. 234-285. 3. Business Principles and Management, 5th Ed., Shilt/Carmichael/Wilson; South-western Publishing Co., pp. 133-169.

UNIT: MANAGEMENT AND DECISION MAKING

TOPIC: Management (Continued)

Performance Objective(s)	Outline	Occupations	Resources
K. Each student will be able to describe how management establishes and maintains sales promotion control.	K-1 Advertising needs K-2 Visual merchandising K-3 Display K-4 Publicity K-5 Public relations	7,16,17, 18	1. Retailing, Buskirk & Buskirk, McGraw-Hill, pp. 315-83. 2. Retail Merchandising: Concepts and Applications, 9th Ed., Samson, Little & Wingate; Southwestern Publishing Co., pp. 276-351. 3. Business Principles and Management, 5th Ed., Shilt/Carmichael/Wilson; Southwestern Publishing Co., pp. 173-192.
L. Each student will be able to describe how management uses financial planning in a business operation.	L-1 Bookkeeping systems L-2 Budgeting L-3 Management reports L-4 Financial statements a. Balance sheet b. Income statement L-5 EDP	7,18	1. Retail Merchandising: Concepts and Applications, 9th Ed., Samson, Little & Wingate; Southwestern Publishing Co., pp. 464-519. 2. Business Principles and Management, 5th Ed., Shilt/Carmichael/Wilson; Southwestern Publishing Co., pp. 377-416.
M. Each student will be able to describe how management establishes inventory.	M-1 Types of inventory M-2 Selection of method(s)	17,18	1. Retail Merchandising: Concepts and Applications, 9th Ed., Samson, Little & Wingate; Southwestern Publishing Co., pp. 470-478. 2. Business Principles and Management, 5th Ed., Shilt/Carmichael/Wilson; Southwestern Publishing Co., pp. 229-233.

UNIT: MANAGEMENT AND DECISION MAKING

TOPIC: Management (Continued)

Performance Objective(s)	Outline	Occupations	Resources
N. Each student will be able to describe how management establishes and maintains shipping and receiving operations.	N-1 Establish procedures N-2 Set rules and regulations N-3 Instruction of personnel N-4 Quality control	4,5,18	1. Retail Merchandising: Concepts and Applications, 9th Ed., Samson, Little & Wingate; Southwestern Publishing Co., pp. 251-52, pp. 415-26. 2. Business Principles and Management, 5th Ed., Shilt/Carmichael/Wilson; Southwestern Publishing Co., pp. 219-228, 599-619.
O. Each student will be able to describe how management determines and maintains pricing and buying controls and policies.	O-1 Pricing controls O-2 Buying controls O-3 Buying policies O-4 Pricing policies	15,17,18	1. Retail Merchandising: Concepts and Applications, 9th Ed., Samson, Little & Wingate; Southwestern Publishing Co., pp. 237-246, 257-264. 2. Retailing, Buskirk & Buskirk, McGraw-Hill, pp. 234-48, 251-265. 3. Business Principles and Management, 5th Ed., Shilt/Carmichael/Wilson; Southwestern Publishing Co., pp. 113-128, 199-210.
P. Each student will be able to describe how office management related to other marketing functions.	P-1 Functions to be performed P-2 Improving and measuring P-3 Relationship to rest of the operation	18	1. Business Principles and Management, 5th Ed., Shilt/Carmichael/Wilson, South-

UNIT: MANAGEMENT AND DECISION MAKING

TOPIC: Management (Continued)

Performance Objective(s)	Outline	Occupations	Resources
Q. Each student will be able to define and explain the basic concepts of collective bargaining and union management relations.	Q-1 Continuous process of of collective bargaining Q-2 Objectives and tactics Q-3 Legislation	ALL	1. Business Principles and Management, Ed., Shilt/Carmichael/Wilson; Southwestern Publishing Co., pp. 479-490. 2. Business in Action, 2nd Ed., Bittal, Burke & LaForge; McGraw-Hill, pp. 322-42 3. Modern Retailing: Theory and Practice, Mason & Mayer; Business Publications Inc., pp. 370-72. 4. Free Enterprise In the United States, Wyllie & Warmke; Southwestern Publishing Co., pp. 85-106.
R. Each student will be able to identify the careers and trends in management.	R-1 Careers R-2 Trends	ALL	1. Business in Action, 2nd Ed., Bittal, Burke & LaForge; McGraw-Hill, pp. 499-504. 2. Retailing, Buskirk & Buskirk, McGraw-Hill, pp. 465-478. 3. Dynamics of American Business, Justis; Prentice Hall Inc., pp. 512-520.

I. RELATED CASE STUDY: Management and Decision Making

II. CASE TITLE: The Decreased Sales Requires Management Action

III. SUGGESTED GRADE LEVEL: Junior

IV. CASE OBJECTIVES: The purpose of this case study is to prepare students with actions to correct decreased sales. At the conclusion of this case students will be able to:

1. Determine the most efficient way to accomplish a job.
2. Understand a framework of policies and procedures within which to operate a business particularly in a declining sales situation.

V. CASE DESCRIPTION: McHenry's, a fast food operation controlled through a decentralized system of operations, operates 46 fast food stores in the Western United States. The company runs each of these stores through a manager and assistant manager. The company management sets goals for each of the fast foods restaurants to meet in order to improve the overall sales figures throughout the year. If a particular store or stores in the system begins to fall behind, the store manager must come up with a plan of action to stem the lack of sales.

For the first three quarters of the year, McHenry's stores all experience excellent growth. However, during the fourth quarter, one of the stores which you manage began to fall behind in sales. McHenry's called your office and expressed concern and have now asked that you come up with a plan of action to stem the tide of declining sales. You feel, to some extent or another, that the declining sales are due to the surrounding economy but nonetheless you feel some actions must be taken.

What are some of the changes that you would make in order to get the store moving forward again?

VI. SUGGESTED SOLUTION (S): The following actions might be considered by the store manager:

1. Consider sales motivation techniques such as contests for the friendliest employee, extra lunch time for keeping the store in top notch shape, etc. This will provide an incentive for all employees.
2. Consideration should be given to a special sales promotion which could be run to attract added customers into the store on slow days.
3. Hold a store meeting and talk about the problem openly with the employees, discussing the need for increased efficiency, attention to detail, the importance in doing a job well, etc.
4. Consider attractive displays or point of purchase materials that would increase the on-site sale of food products as well as specialized merchandise.

Additional Resources

MANAGEMENT & DECISION-MAKING

Modelnetic, Montana D. E. Library.

"Training Salespeople to Get Success on Their Side," Mide Rodick, Sales and Marketing Management, August 15, 1983, pp. 63-65.

"Manager With the Right Staff," James W. Obermayer, Sales and Marketing Management, December 5, 1983, p. 47.

"Hiring and Training: All the Better for Selling," Bob Woods, Sales and Marketing Management Special Sector, August 15, 1983, pp. 58-60.

"Manville Trains with Style," John B. Dorsey, Sales and Marketing Management, August 15, 1983, pp. 66-67.

Introduction

Entrepreneurship

A recent nationwide survey found that anywhere from 60-70% of Americans dream of owning their own business. In spite of the perils and pitfalls and the record number of small business failures, millions of Americans still harbor the dream. In many ways, as the Gallup polls indicate, owning your own business is somehow hooked up with the "American Dream."

Interestingly enough, this subject has not been an official part of the D.E. Curriculum Guidelines in the past, although most D.E. teachers in Montana did teach certain elements of the subject. The subject of Entrepreneurship is therefore covered in this revision for the first time. Of the many subjects that could have been covered in this area, the following eight were chosen:

- Ownership and Control
- Location
- Financing
- Personnel
- Promotion
- Merchandising
- Customer Services
- Government Regulation

The D.E. teacher is encouraged to add other subjects as deemed necessary.

The case studies and resources at the conclusion of this unit will provide needed "real life" emphasis to the subject of Entrepreneurship.

UNIT: ENTREPRENEURSHIP

TOPIC: Ownership and Control

Performance Objective(s)	Outline	Occupations	Resources
A. Each student will be able to explain the different forms of business ownership and which is best for various types of stores.	A-1 Individual proprietorship A-2 Partnership A-3 Corporation	ALL	1. Dynamics of American Business, Justis; Prentice Hall Inc.; pp. 41-59. 2. PACE, Level 2, Unit 5.
B. Each student will determine the procedures, regulations and requirements for a business to legally operate in Montana.	B-1 Local regulations B-2 State regulations B-3 Federal regulations	ALL	1. Marketing, 3rd Ed., Mason, Rath & Ross, Gregg McGraw-Hill; pp.26-28. 2. PACE, Unit 10, Level 2.
C. Each student will be able to list the advantages and disadvantages of starting a new business versus buying an established business.	C-1 Starting a new business C-2 Buying an exisiting store	ALL	1. PACE, Level 2, Unit 5.
D. Each student will be able to list the advantages and disadvantages of buying a franchise operation.	D-1 Franchising	ALL	1. PACE, Level 2, Unit 5.

UNIT: ENTREPRENEURSHIP

TOPIC: Location

Performance Objective(s)	Outline	Occupations	Resources
A. Each student will be able to list the advantages and disadvantages of five possible areas for store location.	A-1 Downtown A-2 Shopping malls. A-3 Secondary shopping district A-4 Neighborhood shopping district A-5 Side streets	ALL	1. Presenter's Guide Series: Location & Layout for Small Business; U.S. Small Business Administration.
B. Each student will identify various types of traffic and the particular type needed for various businesses.	B-1 Fast traffic B-2 Vehicular traffic	ALL	1. PACE, Unit 8, Level 2. 2. The Small Business Handbook, Burnstiner; Prentice-Hall, Inc.
C. Each student will be able to list sources of business information available in most communities.	C-1 Chamber of Commerce C-2 Staff officer of regional shopping centers C-3 Banks C-4 County officer for Economic development C-5 Federal & State Government Publications	ALL	1. PACE, Unit 8, Level 2.
D. Each student will be able to choose between rental/lease arrangements and ownership of properity.	D-1 Rent costs D-2 Advertising costs D-3 Ownership responsibilities	ALL	1. Small Business Management, Sullivan; William C. Brown. 2. Small Business Management, Pickle & Abrahamson, John Wiley and Sons.

UNIT: ENTREPRENEURSHIP

TOPIC: Location (Continued)

Performance Objective(s)	Outline	Occupations	Resources
E. Each student will be able to identify specific factors on site location.	E-1 Competition E-2 Traffic flow E-3 Transportation E-4 Parking & Zoning Ordinances	ALL	1. PACE, Unit 8, Level 2.
F. Each student will be able to identify the steps involved in selecting a business site.	F-1 Select a general area F-2 Look at several sites within the general area F-3 Establish criteria for each site F-4 Rate each site based on criteria F-5 Make a decision based on ratings	ALL	1. Presenter's Guide Series: Location & Layout for Small Business; U.S. Small Business Administration.

UNIT: ENTREPRENEURSHIP

TOPIC: Financing the Business

Performance Objective(s)	Outline	Occupations	Resources
A. Each student will be able to describe why an owner needs to invest personal funds in a business.	A-1 Resources needed A-2 Raising the money	ALL	1. Financing the Business, Small Business Reporter Series; Bank of America. 2. PACE, Level 2, Unit 8.
B. Each student will be able to explain the difference between equity and debt financing.	B-1 Equity financing B-2 Debt financing	ALL	1. Financing Your Business, Loffel; John Wiley & Sons.
C. Each student will be able to describe the importance of credit in obtaining a bank loan.	C-1 Personal credit history C-2 Business credit history C-3 References	ALL	1. The Small Business Handbook, Burnstiner; Prentice Hall, Inc. 2. PACE, Level 2, Unit 8.
D. Each student will be able to make a presentation to a bank financial officer in order to obtain a small business.	D-1 Financial statements D-2 Capital requirements of a Business D-3 Marketing plan	ALL	1. Business Loans from the SBA, U.S. Small Business Administration. 2. Your Business & the SBA, U.S. Small Business Administration. 3. PACE, Level 2, Unit 8.

UNIT: ENTREPRENEURSHIP

TOPIC: Personnel

Performance Objective(s)	Outline	Occupations	Resources
A. Each student will able to determine the procedures for hiring new employees.	A-1 Job analysis A-2 Job description A-3 Recruiting methods a. Help wanted signs b. Newspaper ads c. Word of mouth d. Referrals e. Family & relatives f. Employment agencies	ALL	1. Personnel Management, Dressler; Reston Publishing Co. 2. Dynamics of American Business, Justis; Prentice Hall Inc., p. 147.
B. Each student will be able to put together a training plan for new employees.	B-1 Goal of training B-2 Type of training B-3 Methods employed B-4 Physical facilities B-5 Instructor B-6 Materials B-7 Cost B-8 Evaluation	ALL	1. Successful Management of the Small & Medium Sized Businesses, Dickson; Prentice-Hall, Inc. 2. PACE, Unit 12, Level 2.
C. Each student will be able to list the characteristics of good supervision.	C-1 Planning C-2 Organizing C-3 Staffing C-4 Directing C-5 Controlling	ALL	1. Business in Action, 2nd Ed., Bittal, Burke & LaForge; McGraw Hill; pp. 79-82 2. Dynamics of American Business, Justis; Prentice Hall Inc., pp 119-121.
D. Each student will be able to construct an employee handbook.	D-1 Company description D-2 Procedures D-3 Benefits D-4 Special services	ALL	Obtain from local businesses.

UNIT: ENTREPRENEURSHIP

TOPIC: Promotion of Business

Performance Objective(s)	Outline	Occupations	Resources
A. Each student will be able to explain the goals of advertising for a business/ services.	A-1 Selling goods & services A-2 Maintaining goodwill A-3 Increasing sales volume A-4 Attract new or existing customers A-5 Introduce new product or idea	ALL	1. Advertising Campaigns: Formulation & Tactics, Quera; Grid Inc., pp. 1-5. 2. Advertising In the Marketplace, Burke; McGraw-Hill Book Co.
B. Each student will be able to construct a basic advertising campaign for a business/ service, utilizing the various media.	B-1 Development of goals of campaign B-2 Selection of merchandise/idea/ concept to base the campaign assured B-3 Selection of media a. Newspaper b. Radio c. Television d. Direct Mail e. Magazines f. Specialty Advertising g. Trade Journals h. Outdoor i. Yellow pages j. Other	ALL	1. Advertising, 5th Ed., Wright, Winter & Ziegler; McGraw-Hill; pp. 128-189.

UNIT: ENTREPRENEURSHIP

TOPIC: Promotion of Business (Continued)

Performance Objective(s)	Outline	Occupations	Resources
C. Each student will be able to plan for a complete store layout for a new business.	C-1 Interior displays C-2 Merchandise presentation C-3 Point of purchase displays C-4 Window displays	ALL	1. Retail Merchandising: Concepts & Application, 9th Ed., Samson, Little & Wingate; Southwestern Publishing Co., pp. 321-324. 2. Advertising & Displaying Merchandise, Harlan E. Samson; Southwestern Publishing Co.
D. Each student will be able to demonstrate a plan of sales training for new employees.	D-1 Approach D-2 Merchandise presentation D-3 Overcoming objections D-4 Closing the sale D-5 Sale of supplementary articles D-6 Departure techniques	ALL	1. Marketing, 3rd Ed., Mason, Rath & Ross, Gregg McGraw-Hill; pp. 346-356. 2. Retail Selling, Bodle & Corey; Gregg McGraw-Hill, pp. 230-284. 3. Personal Selling Foundations Process & Management, Enis; Goodyear Publishing Co., pp. 115-267.
E. Each student will be able to list a range of activities to support promotional plans	E-1 Contests or games E-2 Special endorsements E-3 Fashion shows E-4 Special evening sales E-5 Demonstrations	ALL	

UNIT: ENTREPRENEURSHIP

TOPIC: Merchandising

Performance Objective(s)	Outline	Occupations	Resources
A. Each student will be able to handle the basic terms for ordering merchandise.	A-1 Delivery A-2 Discounts A-3 Dating A-4 Sales terms	ALL	1. Receiving Controls, Ohio D.E. Materials Lab, pp. 3-14. 2. Retail Merchandising: Concepts & Application, 9th Ed., Samson, Little & Wingate; South Western Publishing Co.
B. Each student will be able to describe the basic information contained on an invoice.	B-1 Data ordered B-2 Data delivered B-3 Special shipping instructions B-4 Amount purchased B-5 Price of merchandise B-6 Terms of payment B-7 Prior credits received	ALL	1. Retailing: Principles and Practices, 7th Ed., Meyer, Haines & Harris, Gregg McGraw-Hill, pp. 136-144. 2. Modern Retailing Managment, 9th Ed., Duncan & Hollander; Richard D. Druin, Inc.
C. Each student will be able to explain the importance of marking merchandise for marking and coding of tickets.	C-1 Inventory control & pricing rationale C-2 Price ticket information C-3 Methods of marking C-4 Remarking merchandise	ALL	1. Retail Merchandising: Concepts & Application, 9th Ed., Samson, Little & Wingate; Southwestern Publishing Co., pp. 427-435. 2. Retailing: Principles and Practices, 7th Ed., Meyer, Haines & Harris, Gregg McGraw-Hill; p. 301

UNIT: ENTREPRENEURSHIP

TOPIC: Customer Services

Performance Objective(s)	Outline	Occupations	Resources
A. Each student will be able to identify the factors that go into setting credit limits.	A-1 Required payment period A-2 Customer's past payment record A-3 Customer's potential for future payments	ALL	1. PACE, Unit 15, Level 2.
B. Each student will be able to list the information to be maintained for credit records.	B-1 Customer's name B-2 Customer's address B-3 Maximum amount of credit allowed B-4 Date each item is purchased B-5 Item that is purchased B-6 Amount of each purchase B-7 Amount of each payment received and the outstanding balance	ALL	1. Business Basics, Consumer Credit. A Self-Instructional Booklet; U.S. Small Business Administration, Washington, D.C.
C. Each student will be able to identify effective collection procedures.	C-1 Accurate invoice preparation C-2 Prudent use of cash discounts C-3 Understanding payment terms C-4 Timely preparation of customer statements C-5 Send follow-up letters to delinquent accounts C-6 Assess delinquency charges C-7 Initiate collection policies	ALL	1. Business Basics, Credit & Collections: Policy and Procedure, A Self-Instruction Booklet; U.S. Small Business Administration, Washington, D.C.

UNIT: ENTREPRENEURSHIP

TOPIC: Customer Services (Continued)

Performance Objective(s)	Outline	Occupations	Resources
D. Each student will be able to list the four "C's" of credit.	D-1 Character D-2 Capital D-3 Capacity D-4 Condition	ALL	1. PACE, Unit 17, Level 2. 2. Business Start Up Basics, Dible, The Entrepreneur Press.
E. Each student will be able to list the advantages of extending credit.	E-1 Increased sales E-2 Repeat sales E-3 Building goodwill E-4 Provide a mailing list for the store	ALL	1. PACE, Unit 17, Level 2.
F. Each student will be able to list four disadvantages of extending credit.	F-1 Need more capital F-2 Costs are additional F-3 Increased returned merchandise. F-4 Possible loss of revenue from delinquent and uncollectable accounts	ALL	1. PACE, Unit 17, Level 2.

UNIT: ENTREPRENEURSHIP

TOPIC: Government Regulation

Performance Objective(s)	Outline	Occupations	Resources
A. Each student will be able to identify the purpose of governmental regulations.	A-1 Promote & protect a healthy society A-2 Promote competition A-3 Examples: a. Standards for pure food & drugs b. Pollution of the eminent c. Fair employment practices	ALL	1. How to Start, Finance, & Manage Your Own Business, Mancuso; Prentice-Hall Inc. 2. Maximizing Small Business Profits, Day; Prentice Hall Inc.
B. Each student will be able to identify four sources of regulation.	B-1 Occupational Safety & Health Administration B-2 Environmental Protection Agency B-3 Federal Trade Commission B-4 Equal Opportunity Employment Commission	ALL	1. The Future of Business Regulation, Weiderbaum; AMACOM. 2. PACE, Unit 10, Level 2.
C. Each student will be able to list the types of federal taxes applicable to a business.	C-1 Individual Income Taxes C-2 Corporate income taxes C-3 Excise taxes C-4 Employment taxes C-5 Social Security taxes C-6 Death taxes	ALL	1. PACE, Unit 10, Level 2. 2. How to Start, Finance & Manage Your Own Business, Mancuso; Prentice-Hall Inc.
D. Each student will be able to list the types of state taxes applicable to a business.	D-1 Business real & property taxes D-2 Gross receipt & sales taxes (in most states) D-3 Business automobile & truck licenses D-4 Workmen Compensation Insurance premiums D-5 Incorporation fees D-6 Employment taxes	ALL	1. PACE, Unit 10, Level 2 2. How to Start, Finance & Manage Your Own Business, Mancuso; Prentice-Hall Inc.

UNIT: ENTREPRENEURSHIP

TOPIC: Government Regulation (Continued)

Performance Objective(s)	Outline	Occupations	Resources
E. Each student will be able to list the types of local taxes applicable to a business.	E-1 City, school district and county taxes E-2 Business licenses	ALL	1. PACE, Unit 10, Level 2.
F. Each student will be able to explain the witholding of federal payroll taxes procedures.	F-1 Reporting of federal witholding income tax and Social Security taxes as per form 941 F-2 Depositing the funds witheld F-3 Explanation of form 941 & W-4	ALL	1. PACE, Unit 10, Level 2.

CASE STUDY

I. CASE STUDY: Entrepreneurship

II. CASE TITLE: Understanding Promotional Mix

III. SUGGESTED GRADE LEVEL: Senior

IV. CASE OBJECTIVES: The purpose of this case study is to help students understand the promotional mix as an integral part of a business.

Developing a promotional mix for a business is an important consideration whether a person is in business for himself/herself or works for a major company. At the conclusion of this case study each student will be able to:

1. Determine the usefulness of promotional activities.
2. Know how to apply the factor of cost to the promotional activities.
3. Understand how a smaller business is often confronted with competing with a larger business.
4. Determine the significance of location, merchandise mix, and competition for a small store.

V. CASE DESCRIPTION:* You own Kosy's Konvenient Korner (locally known as the "KKK"), a small sporting good store that carries quality merchandise; furthermore, it should be noted that Kosy's is the only sporting good store in Old Overshoe, Washington.

Old Overshoe is a city of 22,222 people. The average community resident is 38 years, 3 months, one week, two days, and 22 minutes of age. The main source of income is the International Paper Products, which produces 90% of the U. S. government's paper needs, a large activity, indeed! There is another IPP division that manufactures 40% of the home paper products used by the country's families.

Another important employer is Brace's Bountiful Brickworks, Plentiful Purveyors of Pretty Pieces of Pottery, specialized products made from concrete, sand, lime, and glass. Products made by BBB, PPPPP, Inc., are very popular with national and international chain stores. The best selling product is the artistically executed 3- by 2-foot concrete donkey-and-cart combination that graces so many elegant New Jersey front lawns.

The community is located in a recreational area frequented by outsiders as well as the residents; it is near lakes, mountains, and campsites. It has recently become popular as the site for annual meetings of West Coast motorcycle groups, including the Cuddly Tiny Teddy Bears. On their last visit to Old Overshoe the Cuddly Tiny Teddy Bears were good customers of the local stores, including the "KKK" where they bought the total stock of knives, baseball bats, bicycle chains, and other needed products to keep the real bears away from their private campsite, which was located somewhere in the deepest reaches of Mother's Arms' Mountain.

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*This case study is quoted from Economics and Marketing: A Unit of Instruction, prepared by Neeley and Wilson, Office of the Superintendent of Public Instruction, Marketing and Distributive Education, Olympia, Washington.

Your business has been open for 12 years and has been successful. Kosy's Konvenient Korner has always offered quality products and exceptional service in a friendly, relaxed home town atmosphere. "Word of mouth advertising" from satisfied customers has proved to be your best promotion.

Jay-Mart, a large chain sporting good store recently opened a new store in your community. This store, a major operation, is your closest competitor within fifty miles. The new store has been using radio, television, newspaper, and direct mail advertising to make the community aware of their discount prices on a variety of name brand merchandise. In addition, Jay-Mart has a full-time technician for repairing, modifying, and adjusting all the merchandise sold. Each new customer is offered an initial 25% discount on all purchases made during the first visit. AND--Jay-Mart guarantees to undersell any business on any merchandise!

You get the impression that this new competitor wants you out of business.

A recent meeting with your CPA reveals that store sales are down 35%. You are alarmed at this decline. As the store's owner, you must act to protect your investment. What will you do?

1. Will promotional activities help?

2. How much can you afford to advertise?

3. Is your location alright or would you be in favor of changing it?

I. RELATED CASE STUDY: Entrepreneurship

II. CASE TITLE: Locating and Establishing a Pizza Parlor

III. SUGGESTED GRADE LEVEL: Senior

IV. CASE OBJECTIVES: The desire to establish a business is the dream of many young people. Among the many factors affecting this decision are the decisions on identifying potential customers, knowing where they are located, etc. At the conclusion of this case study, the student will be able to:

1. Identify the potential customers of this business.
2. Ascertain the potential number of customers
3. Understand where the potential customers are located.

V. CASE DESCRIPTION:* Ron and Diana make a pizza that is a gastronomical delight. Their friends all agreed that it was better than could be obtained anywhere in the city of Millersburg.

With a small savings, Ron and Diana decided to market their pizza by opening their own pizza parlor business, to be called "Grandfathers' Pizza Parlor."

Their business will be located on the main street in the downtown area with poor parking. The population of Millersburg is 37,000. In the city there are already restaurants serving pizza. The community is family oriented with the average age of 29. The community has one high school.

Ron did some research with the state department of economic development and found that the average American eats pizza 1.85 times per month. The average pizza sale is $9.35.

How would you suggest that Ron determine the answer to these three questions?

1. Who are potential customers?
2. How many are there?
3. Where are they located?

VI. SUGGESTED SOLTUION(S): Discuss with students exactly how they would go about drawing figures from the 37,000 people in the town. Be sure they understand the importance of the physical location of the business.

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*This case study is quoted from Economics and Marketing: A Unit of Instruction, prepared by Neeley and Wilson, Office of the Superientendent of Public Instruction, Marketing and Distributive Education, Olympia, Washington.

Introduction

Economics & Marketing

The statistics regarding a typical high school student's knowledge of economics are appalling at best, according to the Joint Council on Economic Education. Distributive Education programs fare somewhat better, but nonetheless until the last few years did not spend much time on teaching Economic Principles. Today this picture is changing somewhat.

Dr. Terry Anderson, Director of the Montana Joint Council on Education and Dr. Norm Millikin, Department Head in Vocational Teacher Education at Montana State University,are working jointly to improve the quality of teaching in economics at the high school level.

This unit on economics should provide the necessary basics of economics to teach your D. E. students. The resources listed provide interesting aids in teaching economics while the case studies help to stimulate students' thinkings.

UNIT: ECONOMICS

TOPIC: Competition

Performance Objective(s)	Outline	Occupations	Resources
A. Each student will be able to explain the theory of economic competition	A-1 Pure competition A-2 Monopolistic competition A-3 Oligopoly A-4 Monopoly	All	1. Retail Merchandising: Concepts and Applications, 9th Ed., Samson, Little and Wingate, Southwestern Publishing Company. 2. Economics for Young Americans, Phase II, U. S. Chamber of Commerce, Washington, DC.
B. Each student will become familiar with how free interprise fits into the scheme of competition	B-1 Entrepreneur B-2 Free enterprise system B-3 Revenue B-4 Profit B-5 Loss	All	1. Business Principles and Management, 7th Ed., Everhard and Shilt, Southwest Publishing Company. 2. Life Skills: Basic Economics, Understanding Basic Factors, Society for Visual Educationa, Inc., 1345 Diversey Parkway, Chicago, Il 60614.
C. Each student will know the advantages of competition	C-1 Employemnt C-2 Consumer benefits	All	1. Business Principles and Management, 7th Ed., Everhard and Shilt, Southwest Publishing Company. 2. Economics for Young Americans, Phase II, U. S. Chamber of Commerce, Washington, DC.
D. Each student will understand the basic factors of economic production	D-1 Land D-2 Labor D-3 Capital D-4 Management	All	1. Business Principles and Management, 7th Ed., Everhard and Shilt, Southwest Publishing Company. 2. Retail Merchandising: Concepts and Applications, 9th Ed., Samson, Little and Wingate, Southwestern Publishing Company

UNIT: ECONOMICS

TOPIC: Opportunity Costs

Performance Objective(s)	Outline	Occupations	Resources
A. Each student will be able to define opportunity costs.	A-1 Giving up on thing to get another thing A-2 Direct opportunity costs A-3 Indirect opportunity costs A-4 Measuring alternatives	All	1. The Kingdom of Mocha, film from Modern Talking Picture Service , Film Scheduling Center, 2323 New Hyde Park Road, New Hyde Park, HY 11041 2. You Pay for What You Get; Our Economic System, Consumer Information Center, Dept. 703, Public Relations Sears Roebuck & Co., Chicago IL 60684
B. Each student will be able to explain the dynamics of decision-making when confronted with different opportunity costs	B-1 Decision-making for individuals - Prioritizing process - Budgeting process B-2 Decision-making for governments - Budgeting process involving the wants and needs of interest groups B-3 Decision-making for business - Production - Marketing - Expansion	All	1. "In the Marketplace," Economics Project Book, Dr. Norm Millikin, Department of Business and Office Systems, 315 Reid Hall, Montana State University, Bozeman, MT 59717

UNIT: ECONOMICS

TOPIC: Functions of Money

Performance Objective(s)	Outline	Occupations	Resources
A. Each student will be able to define the four functions of money	A-1 Medium of exchange A-2 Measure of value A-3 Store of Value A-4 Standar of future payments	All	1. Fundamental Facts About U. S. Money, Federal Reserve Bank of Atlanta, Information Center, Research Dept., Federal Reserve Station, Atlanta, GA 30303. 2. Economics and Marketing, Blaine Wilson and Kurt Neeley, State of Washington Office of Public Instruction
B. Each student will be able to identify the differences among different kinds of coins	B-1 Gold B-2 Silver B-3 Non-Silver B-4 Minting	All	1. Fundamental Facts About U.S. Money, Federal Reserve Bank of Atlanta, Information Center, Research Dept., Federal Reserve Station, Atlanta, GA 30303 2. Economics and Marketing, Blaine Wilson and Kurt Neeley, State of Washington Office of Public Instruction
C. Each student will be able to write a short definition of money	C-1 Money defined C-2 Money explained	All	1. Fundamental Facts About U.S. Money, Federal Reserve Bank of Atlanta, Information Center, Research Dept., Federal Reserve Station, Atlanta, GA 30303
D. Each student will be able to distinguish the various U.S. currency backings	D-1 Gold certificates D-2 Silver certificates D-3 Federal reserve notes	All	1. Genuine or Counterfeit? Federal Reserve Bank of Minneapolis, Office of Public Information, 250 Marquette Avenue, Minneapolis, MN 55480
E. Each student will be able to distinguish between genuine and counterfeit	E-1 Currency illustrations E-2 Symbols on federal reserve notes	All	1. Genuine or Counterfeit? Federal Reserve Bank of Minneapolis, Office of Public Information, 250 Marquette Avenue, Minneapolis, MN 55480

UNIT: ECONOMICS

TOPIC: Economic Good and Services

Performance Objective(s)	Outline	Occupations	Resources
A. Each student will be able to define economic goods and services	A-1 Economic good - physical object A-2 Economic service - activity and non-physical good	All	1. Economics and Marketing, Blaine Wilson and Kurt Neeley, State of Washington Office of Public Instruction. 2. Economic Learning Activity Packages, Interstate Distributive Education Curriculum Consortium, Ohio State University.
B. Each student will be able to distinguish between consumer and capital economic goods and services	B-1 Consumer goods - individually purchased B-2 Capital goods - used in production of other goods	All	1. Life Skills: Basic Economics, Understanding Economic Trends, Society for Visual Education, Inc., 1345 Diversey Parkway, Chicago, IL 60614
C. Each student will be able to explain how human needs and wants determine the economic goods and services which are offered for sale.	C-1 Purchasing involves preferences C-2 Productive capacity shifts to preference and profits C-3 Consumers are the key to the process	All	1. Economics and Marketing, Blaine Wilson and Kurt Neeley, State of Washington Office of Public Instruction.
D. Each student will be able to explain the relationship of Maslow's hierarch of needs to purchasing of economic goods and services	D-1 Unsatisfied wants and needs affect buying beyavior D-2 Physical-to-self-fullfillment needs involves interaction with the market system	All	1. Business Principles and Management, 7th Ed., Everhard and Shilt, South western Publishing Co, p. 432. 2. Dynamics of American Business, Justis, Prentice Hall Inc., pp. 147-52. 3. Economic Learning Activity Packages, Interstate Distributive Education Curriculum Consortium, Ohio State University.

UNIT: ECONOMICS

TOPIC: Pricing

Performance Objective(s)	Outline	Occupations	Resources
A. Each student will be able to understand the essentials of price	A-1 Supply A-2 Demand A-3 Allocation/rationing A-4 Elasticity of demand	All	1. Economics for Young Americans, Phase II, U. S. Chamber of Commerce, Washington, DC. 2. The Economics of Marketing, Mary Klaurens, McGraw-Hill, Second Edition, 1978.
B. Each student will understand how price is determined	B-1 Price axis B-2 Quantity axis B-3 Equilibrium point B-4 Demand schedule B-5 Supply schedule	All	1. Economics for Young Americans, Phase II, U. S. Chamber of Commerce, Washington, DC. 2. Economic Learning Activity Packages, Interstate Distributive Education Curriculum Consortium, Ohio State University.
C. Each student will become familiar with additional factors affecting price	C-1 Obsolescence C-2 Custom products C-3 Psychological pricing C-4 Pricing policy C-5 Cash vs. credit purchases	All	1. The Economics of Marketing, Mary Klaurens, McGraw-Hill, Second Edition, 1978. 2. Life Skills: Basic Economics, Understanding Basic Factors, Society of Visual Education, Inc., 1345 Diversey Parkway, Chicago, IL 60614
D. Each student will understand how price inflation occurs	D-1 Money shortage D-2 Interest rates	All	1. Economics for Young Americans, Phase II, U. S. Chamber of Commerce Washington, DC.
E. Each studen will understand how government control affects price	E-1 Govermental regulatory agencies E-2 Business reporting procedures	All	1. Economics for Young Americans, Phase, II, U. S. Chamber of Commerce Washington, DC.

UNIT: ECONOMICS

TOPIC: Taxes and Economics

Performance Objective(s)	Outline	Occupations	Resources
A. Each student will be able to explain the difference between direct and indirect taxes	A-1 Direct - passed on A-2 Indirect - hidden	All	1. Life Skills: Basic Economics, Understanding Basic Factors, Society for Visual Education, Inc., 1345 Diversey Parkway, Chicago, IL 60614.
B. Each student will be able to give examples of taxes imposed on individuals and businesses at the state and federal tax level	B-1 Federal direct taxes - Income tax - Social Security tax - Estate tax - Unemployment tax B-2 Federal indirect taxes - tires - airplane tickets - alcohol - cigarettes B-3 State direct taxes - auto licenses - personal income - corporate income tax B-4 State indirect taxes - alcohol - cigarettes - utilities	All	1. Here Are Some of The Taxes You Pay Standard Federal Tax Reporter 1978 Index, Commerce Clearning House, Inc., 1978.
C. Each student will be able to identify the main sources of income	C-1 Federal sources of income - personal income tax - Social Security tax - gift tax - estate tax - corporate income tax	All	1. Analyzing Tax Policy: A Resource Guide, Joint Council on Economic Education, New York, NY.

UNIT: ECONOMICS

TOPIC: Taxes and Economics (Continued)

Performance Objective(s)	Outline	Occupations	Resources
D. Each student will be able to identify the sources of government spending	D-1 Welfare D-2 Public schools D-3 Defense D-4 Highway D-5 Police Service D-6 Postal Service D-7 State or federal or local subsidies D-8 Etc.	All	1. Analyzing Tax Policy: A Resource Guide, Joint Council on Economic Education, New York, NY. 2. Economics and Marketing, Blaine Wilson and Kurt Neeley, State of Washington Office of Public Instruction.

UNIT: ECONOMICS

TOPIC: Economic Indicators

Performance Objective(s)	Outline	Occupations	Resources
A. Each student will be able to identify and define economic indicators	A-1 Gross national product A-2 Consumer price index A-3 Wholesale price index A-4 Unemployment statistics A-5 Dow Jones bond and stock averages A-6 Housing starts A-7 Sales and inventory levels	All	1. Economics and Marketing, Blaine Wilson and Kurt Neeley, State of Washington Office of Public Instruction. 2. Economic Learning Activity Packages Interstate Distributive Education Curriculum Consortium, Ohio State University.
B. Each student will be able to explain how the economic indicators can be used	B-1 Relate explanation to each of the seven categories above	All	1. Economics and Marketing, Blaine Wilson and Kurt Neeley, State of Washington Office of Public Struction. 2. Life Skills: Basic Economics, Making Financial Decisions, Society for Visual Education, Inc., 1345 Diversey Parkway, Chicago, IL 60614
C. Each student will be able to recognize when these indicators are being used in forecasting for the economy.	C-1 Monitoring of newspapers, radio, T.V. programs C-2 Monitoring of Wall Street Journal, The Week in Business, and other business programs	All	1. Economics and Marketing, Wilson and Kurt Neeley, State of Washington Office of Public Instruction. 2. Life Skills: Basic Economics, Making Financial Decisions, Society for Visual Education, Inc., 1345 Diversey Parkway, Chicago, IL 60614

UNIT: ECONOMICS

TOPIC: Other Economic Systems

Performance Objective(s)	Outline	Occupations	Resources
A. Each student will be able to explain the distinctives of the free enterprise system	A-1 Making profit A-2 Suffering a loss A-3 Competing with others A-4 Becoming an entrepreneur A-5 Working for someone else A-6 Establishing contracts A-7 Assuming risks	All	1. Economics for Young Americans, Phase III, U. S. Chamber of Commerce, Washington, DC 2. Economic Learning Activity Packages, Interstate Distributive Education Curriculum Consortium, Ohio State University.
B. Each student will be able to define and recognize the distinctives of a socialistic economic system	B-1 Encorporation of features of free enterprise and communism B-2 Governmental control of means and methods of production of strategic industries: - transportation - energy - health care - strategic materials B-3 Citizens have free choice of occupation B-4 Combines some individual freedoms with central planning and state ownership of the material means of production material	All	1. Economics for Young Americans, Phase III, U. S. Chamber of Commerce, Washington, DC.
C. Each student will be able to define and recognize the distinctives of a Communist system of economic production	C-1 Restricted incentive C-2 Central planning of economy	All	1. Economics for Young Americans, Phase III, U. S. Chamber of Commerce, Washington, DC.

UNIT: ECONOMICS

TOPIC: Other Economic Systems (Continued)

Performance Objective(s)	Outline	Occupations	Resources
	C-3 All means of production controlled - labor - natural resources - capital C-4 Central plan determines - aims of economy - population activities - distribution of income C-5 Wages and prices fixed C-6 Production guides consumer preference C-7 Illigality of labor strikes		2. Economic Learning Activity Packages, Interstate Distributive Education Curriculum Consortium, Ohio State University.

I. RELATED CASE STUDY: Economics

II. CASE TITLE: A Triad of Cases on Competition

III. SUGGESTED GRADE LEVEL: Senior

IV. CASE OBJECTIVES: The purpose of this case study is to aid students in understanding varying economic systems. At the conclusion of these three inter-related cases, students will be able to:

1. Identify competition.

2. Identify the effects of competition on buyers and sellers.

3. Define the following characteristic types of markets: monopoly, oligopoly, and competition.

4. Explain why competition is important to the successful functioning of a private enterprise system.

V. CASE DESCRIPTION*

Case #1 - Motel Services, Montgomery County Oklahoma.

"Mr. Wilson is an older businessman who has made his living in the motel business. In the early days of the motel business, he built and operated BW's Motel, a 12-unit motel that catered to the few people who passed through the county on their way to some other place. Later, the Interstate Highway cut through the very corner of the county and Mr. Wilson fortunately owned the property on which the county's one exit-entrance was located; he built anothermotel, with 36 units. He recently purchased the last competing motel in Montgomery County Oklahoma. He now owns and operates the only three motels in the county.

Mr. Wilson is a shrewd businessman whose methods have increased his profits considerably. After buying the third motel, he cancelled telephone service, sold his television sets at auction, removed rather than repaired the broken ice machine and central airconditioning units, and released all but one maid who is now responsible for all three motels. He no longer buys facial tissue and coffee for the guests. As Mr. Wilson said,'Guests don't appreciate them anyway and they cost money. Besides that, they damage a lot of things and steal what they can take.'

The motel business is proving to be very profitable for Mr. Wilson."

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*This case study is quoted from Economics and Marketing: A Unit of Instruction, prepared by Neeley and Wilson, Office of the Superintendent of Public Instruction, Marketing & Distributive Education, Olympia, WA.

Case #2 - Motel Services, New Competition Comes to Town

"Mr. Guatney, a retired college professor, moves to Montgomery County Okalahome. With time on his hands, accumulated savings, retirement income, and the desire to remain active, he traveled through the county looking for business opportunities. After staying at all three of Wilson's motels, he saw an opportunity and established his own motel in Wilson's hometown. His motel is traditional and offers the services guests have come to expect: television, telephones, airconditioning, ice machines, etc."

Case #3 - Motel Services, Oil is Discovered in Montgomery County

"Phillips Petroleum has discovered commericial quantities of petroleum in Montgomery County and has established an oil refinery. The construction business is booming and supporting businesses are moving into the county. Montgomery County is now the fastest growing county in Oklahoma.

The many new workers and their families have placed a burden on the available housing. The few motels are always filled to capacity; private house is scarce; apartments are non-existent.

Mr. Neeley, representing Motel 6, establishes ten 100 unit motels throughout the county providing services to the petroleum and related industries. The current housing problem is solved."

As a student in Ms. Robertson's class, you have been asked to:

1. Identify the market classification for each of the cases (i.e.,is each an example of a monopoly, an oligopoly, or competition?).

2. Show why you chose the specific classification.

How would you respond?

VI. SUGGESTED SOLUTION (S): Case #1 is a monopoly, Case #2 is an oligopoly , and Case #3 is competition.

I. RELATED CASE STUDY: Economics

II. CASE TITLE: Wants and Needs Affect Good and Services Produced

III. SUGGESTED GRADE LEVEL: Senior

IV. CASE OBJECTIVES: The purpose of this case study is to help students understand how human motivation to purchase good and services is affected by unsatisfied needs and wants. In addition it is intended to help students understand that human wants and needs determine the economic goods and services that are offered for sale. At the conclusion of this case students will be able to:

1. Differentiate between wants and needs.
2. Know that different people prioritize their wants and needs differently.

V. CASE DESCRIPTION:* Gloria Johnson is a high school junior who is always outdoors: bicycling, camping, fishing, and hunting with the rest of her large family of four brothers and one sister.

Although the family is involved in many outdoor activities, she does not limit herself to just the family. She is active in the Girl Scouts, 4-H, and the school ski club. When the weather is good, she and several of her friends often combine bicycling with camping and the other outdoor sports.

To a great extent, her parents have provided her with most of the things she needs for her leisure-time activities, but since there are others in the family, there is an understandable amount of competition for the family's financial resources. She knows she cannot get some of the specialty items she would like. She realizes that the others in the family have needs and wants, too, and everyone has to consider everyone else. Furthermore, one brother will be going to college next year and it won't be too long before she will be ready for veterinarian school (and the program will last more than the usual four years of college).

After talking with her father, she decided to take his suggestion to get a job and use the income to buy those things she would like to have. Gloria applied for and got a job at Burton's Burger Bar. Burton's just gave her her first paycheck--the largest amount of money she had ever received at one time. Her problem (a problem many would like to have!) was deciding what to do with the money. As her friend, list and discuss with her:

1. Five things she might do with her money that would be wants. Explain why they are wants and not needs.

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*This case study is quoted from Economics and Marketing: A Unit of Instruction, prepared by Neeley and Wilson, Office of the Superientendent of Public Instruction, Marketing and Distributive Education, Olympia, Washington.

2. Five things she might do with her money that would be needs. Explain why they are needs and not wants.

3. Why would some of Gloria's wants be classified as needs by someone else?

VI. SUGGESTED SOLUTION: As the distributive education teacher, have the students list their answers on the board and go over their choices with the entire class. Suggest that students defend their listing of wants and needs, and attempt to prioritize them.

Additional Resources

ECONOMICS & MARKETING

"Economics & Marketing," Dr. Blaine Wilson and Kent Neeley, State of Washington Office of Public Instruction, pp. 1-21.

"Introduction to Economics," Outline, University of Nebraska, pp. 13-14.

Banking Is, National Learning Productions, Inc, Sixth Avenue, Box 246, St. Albans, WV 25177.

Economics for Young Americans, Phase I, Economics for Young Americans, Phase II, Economics for Young Americans, Phase III, Chamber of Commerce of the U.S., 1615 H. Street, NW Washington, D.C. 20062.

Life Skills Basic Economics, Society for Visual Education, 1345 Diversey Parkway, Chicago, IL 60614

Money Checks and Banks
  The Checking Account
  Reconciling Your Bank Balance
  The Federal Reserve System
  The Nature of Money
  Travels of a Check
  Services of A Bank, Universal Studios, Universal Education and Visual ARts, Hollywood, CA.

Chickenomics, Montana D.E. Library.

Introduction

Introduction to Computers

The title of the first unit of instruction in this section aptly explains the reason for the coverage of this subject area: "Computers Are All Around U." It seems almost unthinkable that the computer is rapidly replacing many of the mundane jobs that formally took all of our mental discipline to complete. And it does them more accurately, more efficiently and faster than we even could have, even working at our top speed and efficiently. Nowhere is this more true than in business.

Software programs, which have lagged behind technical, hardware advances, are available today in almost every business function. They are all available on a small personal computer that is readily available to even the smallest business today.

In the D. E. classroom we must of necessity be teaching about computers and their applications in businesses in Montana. For this purpose this unit was put together covering the following areas:

*Computers Are All Around Us
*Basic Terminology
*Software Programs
*Entering, Storing and Outputting Information
*Personal Student Involvement

The basics of the computer are covered in these units. D. E. teachers are encouraged to complement these units with classroom projects on a personal computer. Finally, the interesting case studies should provide stimulation for students to think about the implications of the computer for a business.

UNIT: COMPUTERS

TOPIC: Computers Are All Around Us

Performance Objective(s)	Outline	Occupations	Resources
A. Each student will be able to explain the various uses of computers in everyday life	A-1 Point-of-sale terminals A-2 Computerized cash register A-3 Newspaper printing A-4 Motel locking system A-5 Game and learning activities	All	1. Understanding Computers, Grace Murray Hopper and Steven L. Mandell, West Publishing Company, St. Paul, MN, pp. 4-6.
B. Each student will be able to understand that banks and other financial institutions make widespread use of computers	B-1 Banking transaction - how it works B-2 Numbering system in banking transactions B-3 Plastic money - the trend of the future - built on computers	All	1. Computers Today, Donald H. Sanders, McGraw-Hill Book Company, New York, NY, pp. 8-9.
D. Each student will be able to understand the four generations of computers	C-1 First generation - 1951-58 - vacuum tubes C-2 Second generation 1959-64 - transistors C-3 Third generation - 1965-71 - integrated circuits and silicon chips C-4 Fourth generation - 1974-present - large scale integrated circuits and micro-processors	All	1. Understanding Computers, Grace Murray Hopper and Steven L. Mandell, West Publishing Company, St. Paul, MN, pp. 16-21.

UNIT: COMPUTERS

TOPIC: Basic Terminology

Performance Objective(s)	Outline	Occupations	Resources
A. Each student will be able to explain the basic terminology used in working with computers.	A-1 Computer - a general-purpose machine with speed, accurancy and memory A-2 Software - programs that direct the computer A-3 Hardware - the actual physical machine A-4 Minicomputer - computer with components of a full-size system but having smaller memory A-5 Online - in direct communication with the computer A-6 Central processing unit (CPU) - is the "brain" of the computer	All	1. Understanding Computers, Grace Murray Hopper and Steven L. Mendell, West Publishing Company, St. Paul, MN, pp. 18-20. 2. Computers and Data Processing, Capron and Williams, Benjamin/Cummings Publishing Company, Inc., Menlo Park, CA, pp. 17-21.
B. Each student will be able to use each of the terminology entries in a conversation	B-1 Projects for students to ensure mastery of terms	All	1. As deemed necessary by teacher

UNIT: COMPUTERS

TOPIC: Software Programs

Performance Objective(s)	Outline	Occupations	Resources
A. Each student will be able to identify the various uses of home management software packages	A-1 Home inventory program - electronic address - coin collector's book - valuables inventory A-2 Home management program - income tax - home budget - resume writers	All	1. Understanding Computers, Grace Murray Hopper and Steven L. Mandell, West Publishing Company, St. Paul,MN, pp. 155-56. 2. Computers and Data Processing, Capron and Williams, Benjamin/Cummings Publishing Company, Inc., Menlo Park, CA, p. 212.
B. Each student will become familiar with the various uses of educational software packages	B-1 Drill packages - present short passage of material and then drill the learner on the contents B-2 Tutorial programs - geared toward explaining concepts or steps B-3 Simulation programs - teaches learner response by imitating a situation or action of machinery	All	1. Understanding Computers, Grace Murray Hopper and Steven L. Mandell, West Publishing Company, St. Paul, MN, p. 156.
C. Each student will become familiar with the fact that computer games are software packages	C-1 Arcade-like - shoot'em up - videos - Donkey Kong - Frogger - Pac Mac	All	1. Understanding Computers, Grace Murray Hopper and Steven L. Mandell, West Publishing Company, St. Paul, MN, p. 157.

UNIT: COMPUTERS

TOPIC: Software Programs (Continued)

Performance Objective(s)	Outline	Occupations	Resources
	C-2 Adventure games - word games incorporating graphics Zork Twirk C-3 Educational games - combining learning with game play		
D. Each student will become familiar with the uses of various business software packages	D-1 Common business uses - word processing - payroll - inventory - merchandise control - accounting - spreadsheet - budgeting	All	1. Understanding Computers, Grace Murray Hopper and Steven L. Mandell, West Publishing Company, St. Paul, MN, p. 154 2. Computers and Data Processing, Capron and Williams, Benjamin/Cummings Publsihing Company, Inc., Menlo Park, CA, pp. 311-316.

UNIT: COMPUTERS

TOPIC: Entering (Inputting), Storing and Outputting Information

Performance Objective(s)	Outline	Occupations	Resources
A. Each student will be able to differentiate between entering and storing devices	A-1 Tape Cassette - uses high-density digital recording tape to record data A-2 Flopp disk - a low-cost random-access storage unit made of plastic A-3 Magnetic Tape - a continuous strip of coated plastic tape wound onto a reel - Example: tape cassette A-4 Cartridges - used extensively with computer games A-5 Joystick - control the movements of cursors on a T.V. screen A-6 Cursor - a mark that indicates where you are on the screen	All	1. Understanding Computers, Grace Murray Hopper and Steven L. Mendell, West Publishing Company, St. Paul, MN, pp. 42-48.
B. Each student will be able to identify the characteristics of punches cards as input	B-1 Examples of punches cards - telephone bills - time cards - checks	All	1. Understanding Computers, Grace Murray Hopper and Steven L. Mendell, West Publishing Company, St. Paul, MN, pp. 49-51. 2. Computers and Data Processing, Capron and Williams, Benjamin/Cummings Publishing Company, Inc., Menlo Park, CA, pp. 91-97.

UNIT: COMPUTERS

TOPIC: (Entering (Inputting), Storing and Outputting Information (Continued)

Performance Objective(s)	Outline	Occupations	Resources
	B-2 Characteristics of standard punched card - 80 vertical columns and 12 horizontal rows - each hole punched in a particular column represents a given character - holes are punched (data entered) by keypuncher		
C. Each student will be able to distinguish between different types of computer printers	C-1 Impact printers - printer - keyboard like a typewriter - dot matrix - characters formed by combinations of dots - others as deemed necessary by teacher: daisy-wheel printer, print-wheel printer, and drum printer		1. Understanding Computers, Grace Murray Hopper and Steve L. Mendell, West Publishing Company, St. Paul, MN, pp. 51-58. 2. Computers and Data Processing, Capron and Williams, Benjamin/Cummings Publishing Company, Inc., Menlo Park, CA, pp. 123-127.
	C-2 Non-impact printers - electrostatic printer - forms image with electrically charged dot matrix - others as deemed necessary by teacher: electro-thermal printer, ink-get printer, and laser printer		

UNIT: COMPUTERS

TOPIC: Personal Student Involvement

Performance Objective(s)	Outline	Occupations	Resources
A. Each student will become proficient in the use of a microcomputer via a business simulator game	A-1 At instructor discretion, students should be scheduled on the micro for a business-simulated game	All	1. See listing of computer business games at back of this section
B. Each student will be able to handle an inventory problem devised by the teacher	B-1 Instructor should prepare a problem consistent with the business game the student is using	All	2. See instructions on each of business games.

I. RELATED CASE STUDY: Computers

II. CASE TITLE: Working with Computers

III. SUGGESTED GRADE LEVEL: Senior

IV. CASE OBJECTIVES: The purpose of this case is to have students think through the implications of the computer in the business setting. At the conclusion of this case study students will be able to:

1. Determine the usefulness of a computer for business operations; and
2. Know the procedures to follow to ensure computer literacy in a business

V. CASE DECSRIPTION: Monty's Food Market on North Ada Street has been enjoying a tremendous business ever since Monty opened the store in 1980. First, he expanded to include the 10,000 feet next door when Joe's Fix-It-Shop went out of business. Then he built another 7,000 feet onto the rear of the store. Now he is contemplating moving the business to a new larger location.

However, all this growth has also created problems. Monty is having increasing troubles keeping track of his inventory. Sometimes an item moves so fast that he doesn't even know it is out of stock until the hole shows up on the shelf.

Recently, he was approached by a computer software salesman who insisted that his new program could solve all of Monty's stocking and inventory problems. The system was so advanced, he said, that Monty could check the status of his inventory every day, or even every half-day, if he wanted. Monty would know exactly how many of a given item was left on the shelf, if he used his new computerized labeling service.

What would you advise Monty to do? What are some of the things he will want to consider before saying "yes" to the computer salesman?

VI. SUGGESTED SOLUTION(S): The class will want to think through the cost of the software part of the program, the cost of acquiring computerized cash registers, which will be required, the overall need for the service, etc. This serves as an excellent opportunity to acquaint students with the advantages and disadvantages of computerized services.

I. RELATED CASE STUDY: Competition

II. CASE TITLE: Helping Everyone Like the Computer

III. SUGGESTED GRADE LEVEL: Senior

VI. CASE OBJECTIVES: The purpose of this case study is to help students understand that not everyone is accepting computers and that obtaining that acceptance is no easy task. At the conclusion of this case study each student will be able to:

1. Understand resistance to compueters.
2. Know a strategy for overcoming resistance.
3. Realize the importance of educating all of a business's personnel in the importance of computers to the store's successful operation.

V. CASE DESCRIPTION: As the manager of the shoes department of a major department store, you have frequent and daily contact with the newly-established computerized inventory program. Since you were acquainted with the computer in your D. E. classroom, you understand a little about how it works and that has helped tremendously in your working with the program.

However, you are becoming increasingly aware that several of your employees do not share your enthusiasm for this new wonder machine. In fact, one of the employees who has been with the department store the longest is the most opposed to the new computerized program.

What courses of action might you undertake as department manger to stem this tide of resistance?

VI. SUGGESTED SOLUTION (S): There are several courses of action you might try:

1. Have a general meeting of all employees to explain the benefits of the new system.
2. Conduct specific training with all employees to be sure they can work the computer efficiently and with little frustration.
3. Meet separately with individuals who have stronger resistance, particularly older, more established sales personal. Explain how important their support is for this new program.

Introduction

Competitive Events

The prior edition of the Disttributive Education Guidelines had the Competency Tasks associated with each of the subject areas outlined in this section of the manual. Extensive contact with D.E. teachers confirmed that that section was simply not being used. Therefore, this section will now list competitive events for each of the following areas:

* Advertising Services
* Apparel and Accessories
* Finance and Credit
* Food Marketing
* Food Service
* General Merchandising
* Petroleum

The specific instructions, materials needed, etc. is followed by the solution to the event.

These materials should provide needed practice events for teachers wishing to prepare students for competitive events, or giving students a contest to test proficiency in the subject area.

Competitive Events

Advertising Services

COMPETENCIES

Skill in relating merchandise benefits to a customer's needs when talking about it.

Skill in sensing a customer's objections and handling them as effectively as possible.

Ability to question, observe and listen in order to complete a successful sale.

Ability to provide customers "facts and benefits" with discretion, analyzing and judging their reactions.

An awareness that people usually do not buy merchandise itself; rather, they buy merchandise benefits.

OBJECTIVE

Demonstrate the ability to tie together the value of this advertising media, use of proper sales techniques and effective communications skills in an effort to obtain business as a specialty advertising salesperson.

DESCRIPTION

The participant will assume the role of a specialty advertising salesperson for Specialty Advertising Inc.. The salesperson will be responsible for selling an advertising message using specialty items, such as, pens, rulers, etc. to carry an ad message.

PROCEDURE

You are to assume the role of a specialty advertising salesperson for Specialty Advertising Inc.. You will attempt to sell the customer one of the items on the prep table using the item as a way of advertising the customers business. The customer is the owner of a small hardware store. The store is located in a small town of about 8,000 people. The rural community around the area is mainly involved in farming. The owners name is Fred Waters. You should sell the store owner on the benefits of specialty item advertising, on specialty items, such as pens, pencils, etc.

You will have 10 minutes to read these instructions and ask questions. Ask questions at this time; once the event begins, you will not be permitted to ask questions.

You will be given fact sheets containing information about the specialty advertising items. You will have 10 minutes to read these directions, ask questions, look over the fact sheets and the specialty items and prepare a sales presentation.

You will be led to the event area where you will have 10 minutes to deliver your presentation to the store owner.

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*This advertising and display series was prepared by Thomas Wyatt and John Wahle, Scarlet Oaks, Ohio, as part of a U.S.O.E. funded project

The timer will warn you after 8 minutes, you will stop you at the end of 10 minutes.

You will be evaluated on the organization and delivery of your presentation.

REMEMBER!! Ask questions now! You will not be permitted to ask questions once the event begins!

FOR
SM...OOTH
SERVICE
Always Call
KELLY
SERVICES

Hand Lotion Bottle

Every day can be "Ladies Day" with this handy purse-size squeeze bottle filled with 85 applications of rich, creamy Balm Argenta hand lotion. Your ad nicely screen printed on the front of this useful gift will make a favorable impression on any woman. These little bottles are easily refilled, so a long life is assured.

ACTUAL SIZE: 3⅛" x 1⅝" x ⅞". IMPRINT: 8 lines on front in 1¼" x 1¾" area—choice of red, blue, green or black.

No. 9533-HLB **HAND LOTION BOTTLE**

250 To 499	500 To 999	1000 To 2499	2500 To 4999	5000 To 9999	10,000 To 24,999	25,000
.79	.67	.54	.50	.45	.41	.37

[illegible] SHIPPING WEIGHT — 10 LBS. PER 125 F.O.B. ST. PAUL, MN.

KLIPPER KING® DELUXE When you want to give that "something extra," this is one of the finest-quality nail clippers available, regardless of price. Hardened and tempered steel construction throughout.

	250-499	500-999	1M-2499	2500-4999	5M-9999	10M-UP
Chrome	54	.52	46	.41	40	38
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
Gold	1.44	1.42	1.27	1.15	1.12	1.10

No. 7000 QUIK-VU MIRROR

With Guaranteed Lifetime Imprint

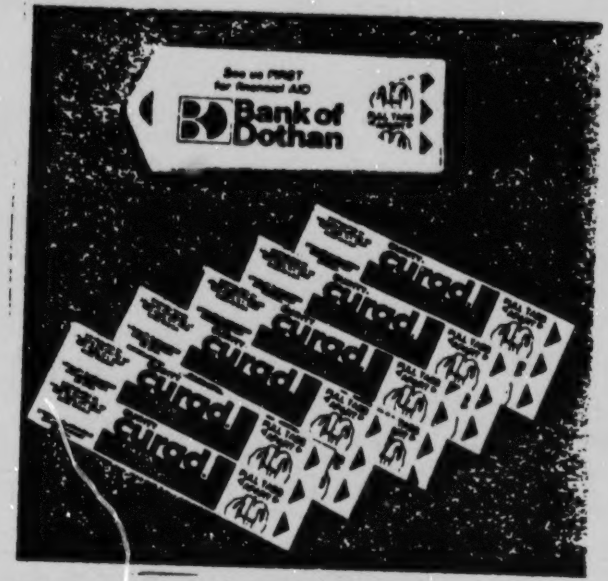
Colors: Translucent red, blue, green, plum, yellow, orange and opaque cream. (Choice or assortment up to 4 colors)

WHITE INK standard on all except yellow and cream. BROWN or BLACK standard on yellow, cream and orange. $5.00 net extra charge to change ink during production, i.e. half printed with black ink and half printed with white ink.

Minimum order 250. Prices include up to 6 lines (plus slogan) or logo using standard type styles in straight line setup. Any nationally used trademark, cut or emblem may be included at no extra charge. For extra lines, cuts, art, etc., see back page.

3A-B-C-D	**250**	**500**	**1000**	**2500**	**5000**	**10,000**
Imprint 1 side ea.	.53	.49	.47	.415	.37	.33
BG						
Second side	.07	.06	.055	.05	.045	.045

Second color imprint refer to back page.



Bandage Dispenser

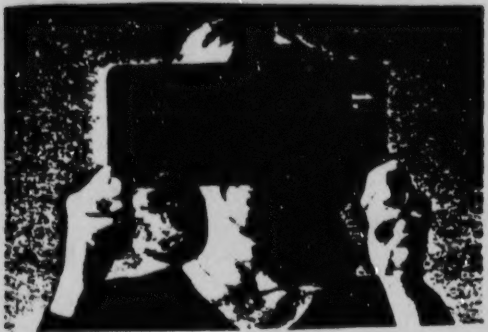
(E) This attractive dispenser holds five "Ouchless" bandages and is easy to refill...just snap open the hinged door on the end and slide in more bandages. It is handsome, tough and so practical everybody wants one. Your message beautifully screen printed on the top of this dispenser will favorably impress everyone who sees it.

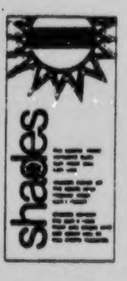
ACTUAL SIZE: 1½" x 3⅞" x ½". IMPRINT: 4 lines on top side in 1" x 2" area in choice of red, blue, green or black. SPECIAL LOGOS: From good line art $8.00 net. SECOND SIDE IMPRINT: $12.00 net set-up plus $.04 net per piece. BALL CHAINS: Add $.09 (E) each.

No. 9533-FBD **BANDAGE DISPENSER**

500 To 999	1000 To 2499	2500 To 4999	5000 To 9999	10,000 To 24,999	25,000
.42	.36	.32	.29	.25	.23

[illegible] SHIPPING WEIGHT — 14 LBS. PER 500 F.O.B. ST. PAUL, MN.





shades

Auto Sun Visor

Clings to glass like magic!

SHADES are a transparent, tinted plastic material that will cling to any clean window surface and can be removed and replaced indefinitely.

SHADES are the safest, most versatile sun visor you can use! They cover all the spots regular visors can't reach, and because they are transparent they screen the sun's rays but still allow you to see traffic hazards.

Each SHADE is beautifully gold stamped with your advertising message and individually packed in a handsome envelope with instructions for its use.

ACTUAL SIZE: 5" x 11¼". IMPRINT: 4 lines of type plus stock cuts gold stamped within a ¾" by 2¾" area near one end of SHADE.

No. 9533-VS **SHADES SUN VISOR**

250 To 499	500 To 999	1000 To 2499	2500 To 4999	5000 To 9999	10,000 To 24,999	25,000
.86	.75	.62	.59	.53	.48	.44

[illegible] SHIPPING WEIGHT — 10 LBS. PER 250 F.O.B. ST. PAUL, MN.

TELE-A-DIAL

If you want people to call you for your product or service you can't find a better advertising vehicle than the Tele-A-Dial. It puts your message right up front on your customers telephone providing 24 hour exposure. Although originally designed for telephone use, with its pressure sensitive backing it can be used on any flat surface such as file cabinets, typewriters, work benches, auto dashboards or anyplace a pen is needed. For constant exposure and effective advertising, put your message on a Tele-A-Dial.

INSERT COLORS: Black, Dark Blue, Light Blue, Navy Blue, Brown, Gold, Forest Green, Ivory, Orange, Red, Silver, White, Woodgrain, Yellow.
IMPRINT COLORS: All standard colors plus metallic gold and silver.
REFILL: Medium point blue ink vinyl.
PACKAGING: Individual cello bags.
MINIMUMS: 125 pieces. 203D & 350 add $12.00 (G). 203DL add $24.00 (G).
DIES: Straight-line copy or stock cuts at no charge. Special cuts $12.00 (G) per color with finished artwork.
ARTWORK: $30.00 (G) per color plus die charge.
CURVED COPY: $5.00 (G).

Style 203D (Barrel copy only)

250	500	1000	2500	5000
.68	.66	.58	.51	.49

2AB2C

Style 203DL (Barrel & Holder copy)

250	500	1000	2500	5000
.84	.82	.73	.65	.63

2AB2C

Style 350 (Pen only)

250	500	1000	2500	5000
.49	.47	.41	.36	.34

2AB2C

MORE THAN MUSIC ENVIRONMENT
MUZAK
mm 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15

Ruling Clasp

The Ruling Clasp, with your ad message permanently hot stamped on its giant clip, stays atop the desk holding papers. It can also hang on the wall displaying messages or travel along on a notebook, clipboard, auto sun visor or pocket. All the while, the ad message is on display for everyone to see.

Quantity	250	500	1000	2500	5000
QP-1640	.59	.57	.56	.50	.45

3ABC

Case Colors — White, Black, Yellow, Orange, Smoke and Crystal Clear.

Copy — Price includes die charge, set up and hot stamping with one color only. Imprint colors: Gold, Silver, Black, Red, Dark Blue, Light Blue, Green, Yellow and Orange.

Printing Plates — National logos are available at no charge. Straight line copy is available at no charge. All other logos and trademarks are $9.00(x).

Scale — 7 inch/17.8 cm.

Packaging — Individual polybags with instructions.

Shipping Weight — Approximately 6 lbs. per 100.

TIMING

The thirty minute (30) event will proceed as follows:

15 minutes - Student prep time
10 minutes - Student sales presentation time.
5 minutes - Judges rating time.

ADMINISTRATIVE SUGGESTIONS

Three (3) prep tables should be available in order that three students can study the information available during this time.

Be sure the timer receives a copy of the schedule details.

Adhere strictly to the time schedule.

Stress that no questions may be answered once the event begins.

A preparation room is needed for the fifteen (15) minute review of the student instruction sheet, fact sheet and available props.

A participation room is needed for the ten (10) minute performance. The room should be arranged so that the judges are able to view and hear the performance process. A table and two (2) chairs should be set up in the room.

All judges should receive copies of the student instructions, judges instructions, customer instructions, fact sheets, and rating forms prior to the event.

MATERIALS AND EQUIPMENT NEEDED

Four stopwatches
Copies of the student instruction sheet
Copies of the fact sheet
Instructions (event manager)
Copies of the evaluation form
Copies of the schedule
Copies of the customer's instructions

PERSONNEL NEEDED

One event manager
Two prep assistants
Three timers
Six judges

RESPONSIBILITIES

Event Manager - This person is responsible for all major decisions in this event. He/she will set up the event, brief all personnel, see that the schedule is followed, see that all materials are where needed, and the completed answer forms are turned over to the series directors A.S.A.P.

Remember To:

Brief all personnel completely.

Be sure that the participants' names and ID numbers are on the judges rating sheets.

Make sure event starts on time and follows schedule.

Collect all rating sheets from the judges and turn in all materials to the series director A.S.A.P.

Prep Assistant- Greet the students as they enter the prep area.

Distribute copies of:
- Student instructions.
- Merchandise fact sheets.
- Judges rating sheet.

Review student instructions and answer any questions the participants may have.

Replace merchandise to complete sets for next participants.

Have participants report to the judges at the prescribed time. One prep assistant should accompany the students to the judging area.

Assist the event manager in other requests.

Timer - Assist students in finding the event area.

Be sure that the event begins on time.

Do not allow the event to exceed beyond the time limits set!

Assist the event manager.

Adhere strictly to the following schedule:

10 minute - student sales presentation time

At 8 minute mark the timer should knock on the door in order to let the student know there is only 2 minutes of time left.

You are to assume the role of the owner of a small hardware store called W. W. Hardware. The store is located in a small town of about 8,000 people. The rural community around the area is mainly involved in farming. Your name is Fred Waters. The contestant will assume the role of a specialty advertising salesperson for Specialty Advertising Inc. selling specialty items with an advertising message on the item. The contestant will be expected to sell you on the benefits of advertising on specialty items, such as pens, rulers, etc. The contestant knows who owns the store.

You should offer light resistance to the contestant's concerns; however, the primary goal is to give the contestant the opportunity to present his/her ideas and make a sale. You are encouraged to buy the item; but if you have not been completely sold on the advertising value of the item, you will not be expected to buy.

PROCEDURE

You will be briefed by the event manager.

Familiarize yourself with the judges rating sheet so that you are aware of what the contestant is being rated on.

The sales presentation will be no longer than 10 minutes.

The timer will warn the contestant at the end of 8 minutes, and will stop the presentation at the end of the 10 minute time frame.

Be as consistant as possible with each contestant.

Advertising & Display
Selling
Judges Instructions

PROCEDURE

You are to listen to a sales presentation that an employee of a specialty advertising company will be delivering to Fred Waters the owner of a small hardware store called W W Hardware.

You will be briefed by the event manager.

Familiarize yourself with the rating sheet so that you are aware of what you should be watching for during the presentation.

The presentation will be no longer than 10 minutes.

You will have approximately 5 minutes to evaluate each student following the presentation.

The timer will warn the participant at the end of 8 minutes and will stop the presentation at the end of 10 minutes.

Be sure that your initials and each participant's name and ID number are on each rating sheet.

Turn in all rating sheets to the event manager.

Advertising & Display
Selling
Rating Form

Judges Initials__________

Participants ID NO.__________

Criteria for Evaluation

Excellent - Enthusiastic, smooth performance, explicit

Very Good - Capable and enthusiastic

Good - Thorough but made errors

Fair - Lacked enthusiasm

Poor - Not acceptable to industry

	EXCELLENT	VERY GOOD	GOOD	FAIR	POOR	____
1. Did the participant approach the client correctly?	10	8	6	4	2	____
2. Were the facts completely and clearly presented?	10	8	6	4	2	____
3. Did the participant relate benefits to customers needs?	10	8	6	4	2	____
4. Was a thorough knowledge of specialty advertising presented?	10	8	6	4	2	____
5. Did the participant demonstrate poise and self-confidence?	10	8	6	4	2	____
6. Did participant anticipate customer objectives?	10	8	6	4	2	____
7. Did the participant speak distinctly?	10	8	6	4	2	____
8. Did the participant sell benefits of specialty advertising?	10	8	6	4	2	____
9. Did the participant close the sale effectively?	10	8	6	4	2	____
				TOTAL		____

Competitive Events

Apparel and Accessories

COMPETENCIES

Knowledge of how to address other people in a businesslike manner whether they are customers, fellow employees, supervisors or management.

Skill in listening to and following directions.

Skill in communicating effectively.

Skill in ability to talk clearly and pleasantly, conveying spirit and enthusiasm in one's speech.

Skill in effective use of speech and vocabulary.

A realization that first impressions are important to the business and last impressions are longest remembered.

Attitude that the ability to communicate skillfully in good English is essential to a person's business advancement.

OBJECTIVES

The participant will demonstrate the ability to effectively communicate in a job interview situation.

DESCRIPTION

The participant will assume the role of a job applicant seeking a position in a men's clothing store. You will be evaluated on your ability to communicate in an interview situation.

PROCEDURES

You will be given fifteen (15) minutes to complete the application form and develop your thoughts.

You will be introduced to the store manager who will interview you for one of the sales positions listed.

You will be given eight (8) minutes to interview.

The interviewer in this event will be the judge.

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*The apparel and accessories event was prepared by Round Klag, Supervisor of Penta County JVS as part of a U.S.O.E. funded project.

JOB APPLICATION INFORMATION

Your communicative skills will be evaluated in a job application situation. You may apply for either position listed below:

Sales - Men's Clothing

Full-time sales positions open for a specialized men's clothing store located in the Eastland Mall. Positions are available in all departments. Sales experience and/or specialized training in apparel required.

Part-time sales positions available in a specialized men's clothing store located in the Eastland Mall. Positions are available in all departments. Hours negotiable depending on availability. Opportunities for advancement to full-time positions.

Participant # ____________

Apparel & Accessories
Communications
Student Instructions

APPLICATION FOR EMPLOYMENT
AN EQUAL OPPORTUNITY EMPLOYER

PLEASE PRINT BELOW

NAME ______________________________ SOC. SEC. NO. ____________

ADDRESS ____
NUMBER STREET CITY STATE ZIP

TELEPHONE ______________ U. S. CITIZEN? YES ______ NO ______

1. Date of Birth ______________________
Month Date Year

The Age Discrimination in Employment Act of 1967 prohibits discrimination on the basis of age with respect to individuals who are 40, but less than 70 years of age.

2. Type of work desired: ____________________ Salary expected ____________

3. Employment desired: Permanent ________ Temporary ______ Part-time ______

4. When could you begin work? ______________________________

5. Who referred you to our company? ______________________________

6. List friends or relatives working for our company. Name/Relationship ____________
____

7. Have you ever been convicted of any crime other than minor traffic violations?
Yes ____ No ____ If yes, when and where ______________________________

Explain ____

8. List any special skills or training which would be beneficial to the job for which you are applying ______________________________
____
____

Discrimination on the basis of a handicap, which does not create an occupational hazard nor prevent substantial job performance is prohibited by Ohio law.

9. Do you have any physical or mental limitations or disabilities which would prevent you from performing any assigned work now or in the future? Yes ____ No ____ If yes, describe ______
____

10. EDUCATION

	NAME AND ADDRESS OF SCHOOL	DATES		GRADUATED		MAJOR
		FROM	TO	YES	NO	
HIGH SCHOOL						
COLLEGE						
GRADUATE SCHOOL						
OTHER						

11. PERSONAL REFERENCES OTHER THAN RELATIVES

NAME	ADDRESS	TELEPHONE NO.	OCCUPATION

12. EMPLOYMENT RECORD (MOST RECENT FIRST INCLUDING MILITARY SERVICE)

NAME & ADDRESS OF COMPANY	SUPVR.	DUTIES	WAGE RATE	DATES		REASON FO LEAVING
				FROM	TO	

No question on this application is asked for the purpose of limiting or excluding any applicant's consideration for employment because of race, color, religion, sex, age, national origin or handicap. Our company is an equal opportunity employer.

I hereby certify that all the information provided is true and complete. I understand that if I am employed, any false information including that given at the time of my physical, may be grounds for immediate discharge. I also understand that final acceptance for employment is subject to successfully passing a physical examination as specified by the company.

APPLICANT'S SIGNATURE ______________________ DATE ______________

COMMENTS BY INTERVIEWER ______________________________________

____

JUDGES INSTRUCTIONS

You are to assume the role of a Store Manager for a men's clothing store.

You will be interviewing applicants for the advertised positions. Students may apply for full or part-time employment, depending on what qualifications they feel comfortable with.

After the interview, you are to evaluate the participant's communicative skills using the evaluation form provided.

We encourage you to make this event as realistic as possible. Please ask questions concerning qualifications, career interests, education, etc. The applicant's application form will be completed prior to the interview and should be secured from the participant when he/she enters the interviewing area. Try to ask each applicant the same questions to make your evaluation easier.

The adult in charge of this event will conduct a run-through of this event with you prior to competition. Please make certain that all questions are answered and that you feel comfortable with your role before competition begins.

You will have only eight (8) minutes for each interview. Screen your questions carefully.

A very special thank you for assisting us in this competitive event.

Participant ID # ______________

Judges Initials ______________

Apparel & Accessories
Communications
Judges Evaluation

EVALUATION

HOW EFFECTIVELY DID THE PARTICIPANT:	EXCELLENT	GOOD	FAIR	POOR
1. Introduce himself/herself by name in opening remarks?	5	4 3	2 1	0
2. Establish a favorable impression when introducing himself/herself?	10 9	8 7 6	5 4 3	2 1 0
3. Demonstrate ability to speak in a business-like manner by:				
a. Being professional in conduct and in responses?	5	4 3	2 1	0
b. Choosing words to minimize misinterpretation?	5	4 3	2 1	0
c. Providing ethical ("correct") responses?	5	4 3	2 1	0
d. Using interviewer's name periodically?	5	4 3	2 1	0
4. Demonstrate enthusiasm for the position?	5	4 3	2 1	0
5. Speak clearly so as to be understood (consider: diction, enunciation, proper grammar, appropriate phraseology, proper English)?	10 9	8 7 6	5 4 3	2 1 0
6. Speak pleasantly, conveying spirit and enthusiasm?	10 9	8 7 6	5 4 3	2 1 0
7. Listen to questions asked during the interview?	10 9	8 7 6	5 4 3	2 1 0
8. Answer questions relating to education, experience, career plans, etc.?	10 9	8 7 6	5 4 3	2 1 0
9. Close the interview with a favorable impression?	10 9	8 7 6	5 4 3	2 1 0
10. Follow instructions on the application form (consider: neatness, completeness, printing, signature, etc.)?	10 9	8 7 6	5 4 3	2 1 0

TOTAL SCORE __________

Schedule Details

This thirty (30) minute event will proceed as follows:

0:00 - 0:15	The participant will review the Student Instruction Sheet and complete the Application Form.
0:15 - 0:20	Walking time to store location.
0:20 - 0:28	Participant interview for sales position with judge.
0:28 - 0:30	Judges evaluate students performance.

Administrative Instructions

Students will be briefed and given the sales positions ads to read and the job applications to complete in the designated mall area.

Be sure students are given time to walk to and given specific instructions on location of the event.

This event will take place in a men's clothing store as designated.

Have personnel located at the location site to instruct students on where to go, time, keep on schedule and collect evaluations.

Three heats will be run.

Materials/Equipment Needed

Clipboards and pencils

Copies of the want ads, student instructions, and job applications

Evaluation sheets

Stop Watches

Judges instructions

Personnel Needed

Event manager
1 Prep room assistant
3 Runners to Store location
3 Timers at Store location
3 Judges

Responsibilities

Event Manager - This person is responsible for all major decisions necessary for this event. Managers will set up the event, brief all personnel, see that students get to specific locations, keep on schedule, collect judges evaluations, compute evaluations, tabulate results, and turn results in to series director.

Prep Room Assistant - Check to see if student is on schedule.

Explain procedures and answer any questions.

Distribute job applications and want ads, and time students.

Assign student event location and send to location with runner.

Location Runner - Escort student to specific location of event as scheduled.

Timer - Check to see if student is on schedule and write ID number on the evaluation sheets.

Introduce student to the Store Manager (Judge) and introduce him as a job applicant.

Pass out evaluations and collect.

Time student; eight (8) minutes to perform event and two (2) minutes for judging. KEEP ON SCHEDULE.

Competitive Events

Finance and Credit

Ohio DECA
SLC 80

Finance and Credit *
Mathematics
Event Manager Instructions
Page 1

COMPETENCIES

1. Interpret monthly billing statements.

2. Add columns of figures with facility.

OBJECTIVES

The participant will demonstrate his/her ability in interpreting a bank statement and reconciling it with a checkbook register.

DESCRIPTION

The participant will assume the role of a bank teller. A customer has received his/her monthly bank statement and cannot reconcile it with his/her checkbook register. The participant must locate the errors and reconcile the register.

SCHEDULE DETAILS

The thirty (30) minute event will proceed as follows:

0:00 - 0:30 The participants will review the Student Instruction Sheet, the Customer Checkbook Register, the Bank Statement, and copies of Cancelled Checks. The participant will locate errors in the Checkbook Register and note them on the Student Answer Sheet.

ADMINISTRATIVE SUGGESTIONS

1. A room is needed large enough to seat all participants.

2. Seating arrangements should allow for adequate space between participants.

MATERIALS/EQUIPMENT NEEDED

a. Copies of Bank Statement

b. Copies of Customer Checkbook Register

c. Copies of Answer Key

d. Copies of Student Answer Sheet

e. Copies of Cancelled Checks (9)

f. Pencils

g. Scratch paper (optional)

PERSONNEL NEEDED

a. Prep Assistant (1)

b. Proctors (1 for every 15 participants)

c. Graders (as needed)

RESPONSIBILITIES

1. Event Manager - This person is responsible for all major decisions necessary in this event. He/she will set up the event, brief the coordinator assistants and be responsible for all materials.

   Remember to:
   a. Be sure participant evaluation form has grader's initials and the participant's I.D. number
   b. Be sure participants leave all materials
   c. Turn in Student Answer Sheets to graders as soon as they are collected.

2. Prep Assistant

   a. Distribute the following items to participants:
      1. Copies of Book Statement
      2. Copies of Customer Checkbook Register
      3. Copies of Cancelled Checks (9)
      4. Copies of Student Answer Sheet
   b. Answer any questions regarding event procedures.
   c. Do not allow the event to exceed thirty minutes.
   d. Assist Event Manager, Proctors and Graders as time permits.

3. Proctors

   a. Survey participant's progress to discourage any dishonest actions on the part of the students.
   b. Assist Event Manager, Prep Assistant and Graders as time permits.

4. Graders - Score Student Answer Sheets using the Answer Key.

---

*This finance and credit event was prepared as a part of a U.S.O.E. funded project in cooperation with Ohio State University.

OBJECTIVES

You will demonstrate your ability in interpreting a bank statement and reconciling it with a checkbook register.

PROCEDURES

You are to assume the role of a bank teller. Your manager asked you to reconcile a customer's checkbook register using the most recent bank statement received. The following items will be provided:

a. Bank Statement
b. Cancelled Checks (9)
c. Customer Checkbook Register
d. Student Answer Sheet

You will be given thirty (30) minutes to locate errors in the customer checkbook register and complete the student answer sheet showing the corrections. Use of calculators or any other aids is prohibited.

MEMBER F D I C

ACCOUNT NUMBER

DATE LAST STATEMENT		NUMBER CHECKS DEBITS		NUMBER DEPOSITS CREDITS				DATE THIS STATEMENT
		9		2				
BALANCE LAST STATEMENT		AMOUNT CHECKS DEBITS		AMOUNT DEPOSITS CREDITS		SERVICE CHARGE		BALANCE THIS STATEMENT
96.36	LESS	775.28	PLUS	606.50	LESS	3.00	EQUAL	-75.42

CHECKS AND OTHER DEBITS	DEPOSITS AND OTHER CREDITS	DATE	BALANCE
			96.36
29.66	450.50		517.20
265.00			252.20
33.86			218.34
22.00			196.34
19.76			176.58
15.00			161.58
165.00	156.00		152.58
100.00			52.58
125.00			-72.42
3.00sc			-75.42

Finance and Credit
Mathematics
Customer Checkbook
Registration

PLEASE BE SURE TO DEDUCT ANY PER CHECK CHARGES OR SERVICE CHARGES THAT MAY APPLY TO YOUR ACCOUNT

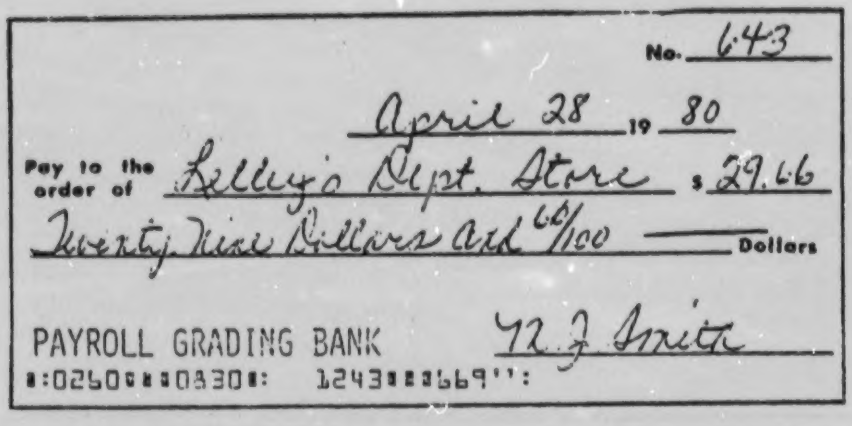
CHECK NO.	DATE	CHECKS ISSUED TO OR DESCRIPTION OF DEPOSIT	(−) AMOUNT OF CHECK		✓ T	(−) CHECK FEE (IF ANY)	(+) AMOUNT OF DEPOSIT		BALANCE	
									96	36
643	5/25	Zelley's Dept. Store Clothes	29	66					29 66	66 70
		Deposit					450	50	450 516	50 20
644	5/21	Luxury Apts. Rent	265	00					265 251	00 20
645	5/30	Food Fair	33	86					33 227	86 44
646	5/30	Graphics House Picture for Den	19	76					19 247	76 20
647	6/2	Prairie Lake H1611-Schl DECA Donation	15	00					15 232	00 20
648	6/5	Sam's Service 4-Tires	165	00					165 67	00 20
		Deposit					156	00	155 233	00 20
649	6/5	Sports Center	100	00					100 133	00 20
651	6/6	Leo's Chevrolet	125	00					125 8	00 20

REMEMBER TO RECORD AUTOMATIC PAYMENTS / DEPOSITS ON DATE AUTHORIZED.

BEST COPY AVAILABLE

OHIO DECA
SLC 80

FINANCE & CREDIT
MATHEMATICS
CANCELLED CHECKS
Page 1



No. 643

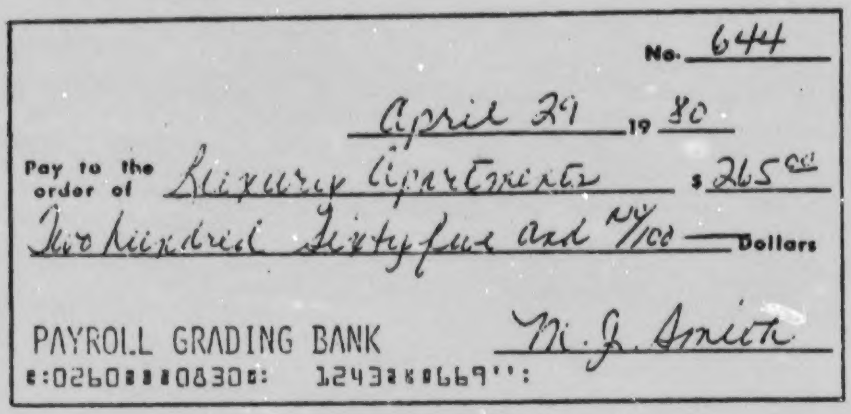
April 28 19 80

Pay to the order of Kelley's Dept. Store $ 29.66

Twenty Nine Dollars and 66/100 Dollars

PAYROLL GRADING BANK M. J. Smith

⑆0260⑆⑆0830⑆: 1243⑈⑈669'':



No. 644

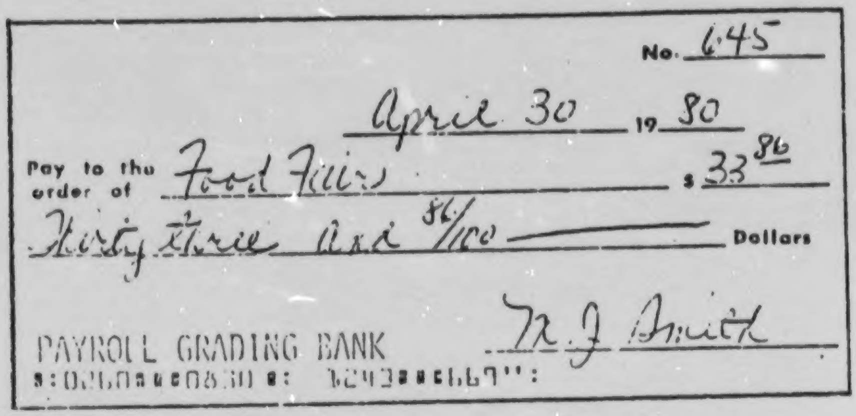
April 29 19 80

Pay to the order of Luxury Apartments $ 265.00

Two Hundred Sixtyfive and no/100 Dollars

PAYROLL GRADING BANK M. J. Smith

⑆0260⑆⑆0830⑆: 1243⑈⑈669'':



No. 645

April 30 19 80

Pay to the order of Food Fair $ 33.86

Thirty three and 86/100 Dollars

PAYROLL GRADING BANK M. J. Smith

⑆0260⑆⑆0830⑆: 1243⑈⑈669'':

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No. 646

April 30 19 80

Pay to the order of Blake Insurance $ 22.00

Twenty two and no/100 Dollars

PAYROLL GRADING BANK M.J. Smith

:0260::0830: 1243::669'':

No. 647

April 30 19 80

Pay to the order of Graphics House $ 19.76

Nineteen and 76/100 Dollars

PAYROLL GRADING BANK M.J. Smith

:0260::0830: 1243::669'':

No. 648

May 2 19 80

Pay to the order of Prairie Lake High School $ 15.00

Fifteen and no/100 Dollars

PAYROLL GRADING BANK M.J. Smith

:0260::0830: 1243::669'':

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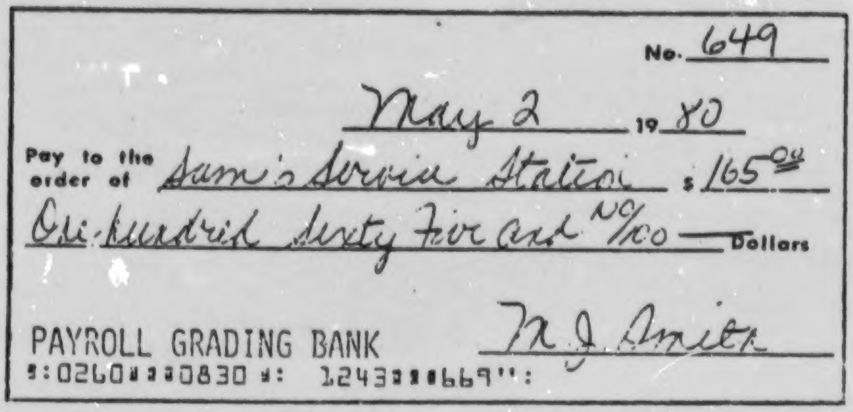


No. 649

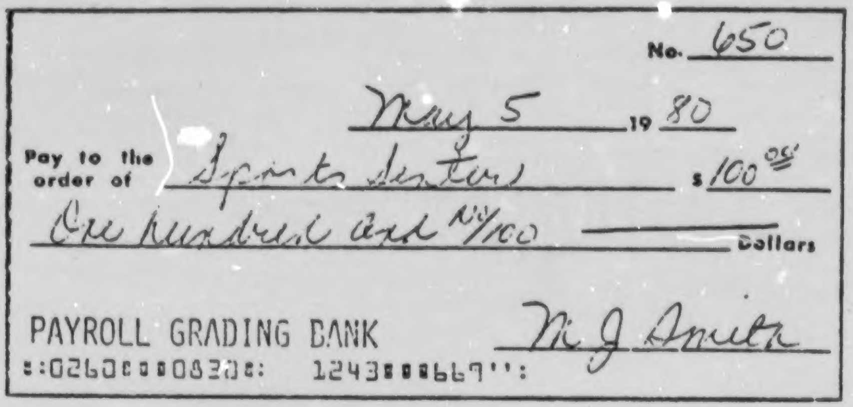
May 2 19 80

Pay to the order of Sam's Service Station $ 165.00

One hundred sixty five and 00/100 Dollars

PAYROLL GRADING BANK M. J. Smith

⑆0260⑈0830⑆ 1243⑈669⑈



No. 650

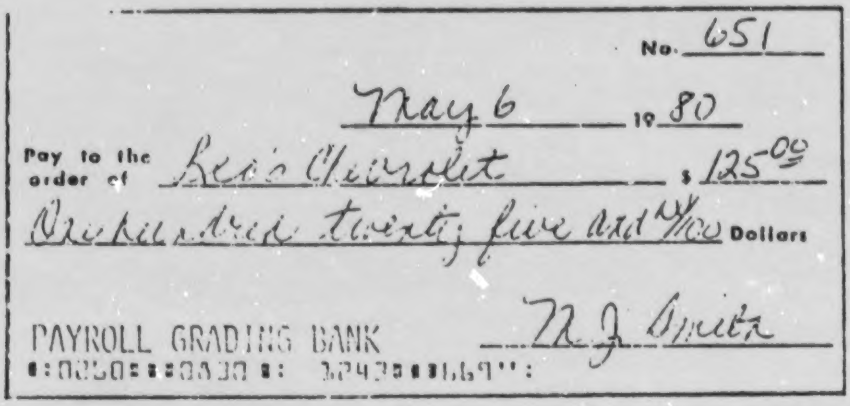
May 5 19 80

Pay to the order of Sports Center $ 100.00

One hundred and 00/100 Dollars

PAYROLL GRADING BANK M. J. Smith

⑆0260⑈0830⑆ 1243⑈669⑈



No. 651

May 6 19 80

Pay to the order of Lee's Chevrolet $ 125.00

One hundred twenty five and 00/100 Dollars

PAYROLL GRADING BANK M. J. Smith

⑆0260⑈0830⑆ 1243⑈669⑈

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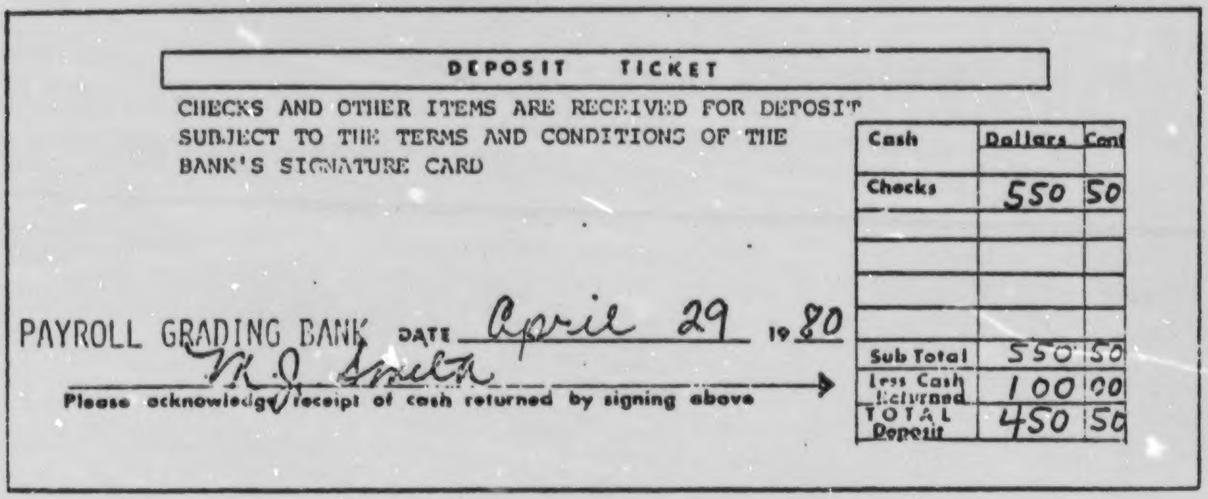


DEPOSIT TICKET

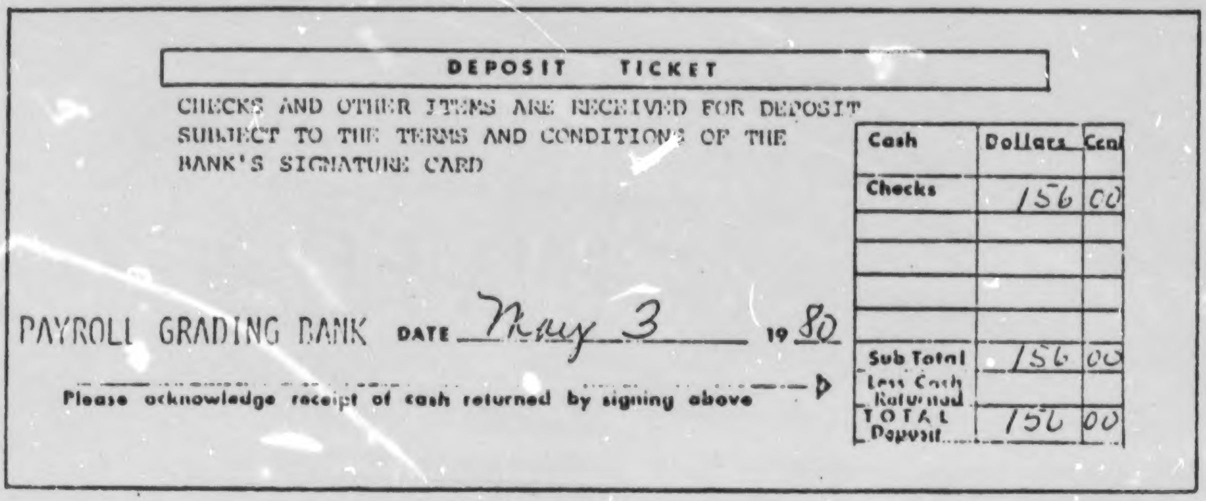
CHECKS AND OTHER ITEMS ARE RECEIVED FOR DEPOSIT SUBJECT TO THE TERMS AND CONDITIONS OF THE BANK'S SIGNATURE CARD

Cash	Dollars	Cen
Checks	550	50
Sub Total	550	50
Less Cash Returned	100	00
TOTAL Deposit	450	50

PAYROLL GRADING BANK DATE April 29 19 80

M. J. Smith

Please acknowledge receipt of cash returned by signing above



DEPOSIT TICKET

CHECKS AND OTHER ITEMS ARE RECEIVED FOR DEPOSIT SUBJECT TO THE TERMS AND CONDITIONS OF THE BANK'S SIGNATURE CARD

Cash	Dollars	Cen
Checks	156	00
Sub Total	156	00
Less Cash Returned		
TOTAL Deposit	156	00

PAYROLL GRADING BANK DATE May 3 19 80

Please acknowledge receipt of cash returned by signing above

BEST COPY AVAILABLE

Finance and Credit
Mathematics
Student Answer Sheet

Participant Name____________________ID#________________

INSTRUCTIONS - You are to fill in each of the following blanks using materials provided.

	Customer's Balance	Correct Balance	Difference
	$ 96.36	$ 96.36	- 0 -
Check #643			
Deposit ($450.50)			
Check #644			
Check #645			
Check #646			
Check #647			
Check #648			
Check #649			
Deposit ($156.00)			
Check #650			
Check #651			
Service Charge ($3.00)			$- 83.62

Ohio DECA
SLC 80

Finance and Credit
Mathematics
Answer Key

INSTRUCTIONS - You are to fill in each of the following blanks using materials provided.

	Customer's Balance	Correct Balance	Difference
	$ 96.36	$ 96.36	- 0 -
Check #643	66.70	66.70	- 0 -
Deposit ($450.50)	516.20	517.20	1.00
Check #644	251.20	252.20	1.00
Check #645	227.44	218.34	-9.10
Check #646	227.44	196.34	-31.10
Check #647	247.20	176.58	-70.62
Check #648	232.20	161.58	-70.62
Check #649	67.20	-3.42	-70.62
Deposit ($156.00)	233.20	152.58	-80.62
Check #650	133.20	52.58	-80.62
Check #651	8.20	72.42	-80.62
Service Charge ($3.00)	8.20	75.42	$- 83.62

Each Entry Under The Three Headings; Customer's Balance, Correct Balance, and Difference Is Worth Two (2) Points.

Total Possible Points = 72

SLC - 1982

Finance and Credit*
Communications/Product Knowledge
Student Instructions

COMPETENCIES

Communicate effectively with customers, co-workers and supervisors.

Know that the ability to communicate skillfully and in good English is essential to a person's business advancement.

Skill in satisfactorily handling customer inquiries for general information.

Skill in interpreting store policies to customers.

OBJECTIVES

The participant will demonstrate oral communications, knowledge of IRA accounts, and ability to retain customer good will by answering correctly questions concerning an IRA account.

DESCRIPTION

The participant will be given an information sheet concerning IRA accounts. After the participant has studied the information sheet, he or she will act as an employee at a Credit Union who is knowledgeable about IRA accounts. The participant will be evaluated upon his or her oral communications, knowledge of IRA accounts and the ability to answer correctly questions concerning an IRA account.

PROCEDURES

You are an employee at a Credit Union who is knowledgeable about IRA accounts. You will be evaluated upon your ability to communicate orally information about IRA accounts to a customer and your ability to answer specific questions concerning IRA accounts.

You have thirty (30) minutes total to prepare and eight (8) minutes to answer the questions.

---

*This finance and credit event was prepared by Debbie Popo as part of a U.S.O.E. funded project.

INFORMATION SHEET ON IRA ACCOUNTS

IRA stands for Individual Retirement Account.
An IRA is a long term savings account for retirement and a tax shelter.

Any individual can have an IRA, beginning January 1, 1982, if he/she earns compensation.

Earner income or compensation is defined as wager, salary, tips, bonuses or income earned from "cottage industries" (i.e. working in the home, babysitting, sales of handicrafts, Tupperware, beauty products, etc.)

Compensation does not include royalties, dividends or interest earned, retirement income, rental income, etc.

Types of IRAs

1. Accumulation (contributory) IRA - a wage earner makes contributions (deposits) and the funds accumulate in the account. This will be the most common type of IRA for our Credit Union.

2. Spousal IRA - (also an accumulation IRA) a married couple with only one spouse employed can set up a Spousal IRA. There must be two separate accounts and the employed spouse makes contributions for the unemployed spouse. If the non-working spouse becomes employed, the account does not have to change. Annual contribution limits will change depending on the income of the spouse.

3. Lump sum or Rollover IRA - a lump sum distribution from a pension plan is received to this type of account. There are no dollar limitations on the amount of deposit, however, it must remain separate from any other IRA a member may have with the Credit Union.

4. Non-Rollover, Rollover IRA - a transfer of money from one IRA account to another. Generally, this transfer is made from one financial institution to another. If the member takes possession of the funds, the transfer must be completed within 60 days. This type of rollover can be made once every 12 months without incurring federal penalties. If the transfer is made directly from one financial institution to another, without the member taking possession of the funds, there is no limit to the number of times it can be transferred, without incurring federal penalties. However, the Credit Union will impose dividend penalties on any rollover to another financial institution, if the funds have not been on deposit at least 18 months.

Contributions to IRAs

The maximum annual contribution per individual is $2,000.00 or 100% of compensation, whichever is less.

Contributions to IRAs (continued)

The maximum annual Spousal contribution is $2,250.00 or 100% of income, whichever is less. The monies deposited to Spousal IRAs can be divided between the two accounts in any manner, as long as neither account goes over the $2,000.00 annual contribution.

Contributions to an IRA can be made in any manner the member chooses; a lump sum, by payroll deduction, direct deposit, mail, or in person.

Contributions can be made any time the member chooses. A member may contribute up to the date he/she files his/her income tax (including extensions) and take it off his/her income tax for the year. For example, if a member files on April 15, 1983, he/she can deposit $2,000.00 on that date and deduct it from 1982 income.

Once the account is established, the member does not have to make contributions every year.

There are no limitations to the number of IRA Accounts a member may have; but the aggregate contributions to all of them cannot exceed $2,000.00 per year ($2,250.00) for Spousal Ira's).

No contributions can be made to an existing Spousal IRA after the non-working spouse reaches the age of 65 and the working spouse reaches the age of 70½, unless the non-working spouse becomes employed prior to age 70½.

Funds contributed to an IRA don't have to be from compensation. Earned income is the measure of maximum contribution. It's conceivable that a person may borrow to open an IRA.

Dividends paid on IRA funds are not counted as contributions.

The tax deduction for an IRA is limited to what the member contributes.

The amount contributed to an IRA is deducted from a person's gross income for federal income tax purposes. In addition, state and city income taxes are reduced by the same amount.

If a person contributes more than the maximum amount for the year, a 6% excise tax is imposed by the federal government. This excise tax can be avoided if the person applies the overage to the next year's contribution.

Age Limitations on IRAs

A person must be at least 18 years old and under 70½ years old to open an IRA.
A person may not withdraw from an IRA until age 59½.
A person must begin making withdrawals by age 70½.

Penalties for Early Withdrawal of IRA Funds

Funds withdrawn from an IRA prior to age 59½ are subject to the following federal penalties:
A tax of 10% of the amount withdrawn.
The monies withdrawn will be recognized as income for the year and taxed as such.

The Credit Union will impose the following penalties (in addition to the federal ones) if monies are withdrawn prior to being on deposit for 18 months:
Loss of 180 days dividends and any dividends payable will be reduced to the rate paid on regular shares as of the date withdrawn.

Exceptions to Penalties

There will be no federal penalties imposed for early withdrawals in the following cases:
If a member becomes permanently disabled prior to age 59½.
In case of death, the monies may be transferred to a beneficiary.
Rollover to another IRA fund at another financial institution once every 12 months.

The Credit Union dividend penalty will remain in force if monies are rolled over to another institution prior to being on deposit for 18 months.

Other Penalties

A 6% excise tax will be imposed by the federal government if the member contributes more than the annual limitations.

If withdrawals are not made by age 70½, the federal government will impose a tax of 50% of the minimum withdrawal amount. The minimum withdrawal amount is calculated by dividing the Balance of the IRA at the beginning of the year by the life expectancy of the member or the joint life and last survivor life expectancy.

SCHEDULE DETAILS

The event will proceed as follows:

0:00 - 0:30	Student Preparation
0:30 - 0:38	Judging
0:38 - 0:40	Judges Evaluation

MATERIALS/EQUIPMENT NEEDED

1. Copies of Information Sheets on IRA accounts
2. Pencils
3. Scratch paper

PERSONNEL NEEDED

1. Prep Assistant	(1)
2. Proctors	(2)
3. Judges	(2 per heat)

RESPONSIBILITIES

1. Event Manager - This person is responsible for all major decisions necessary in this event. He/She will set up the event, brief all personnel, see that materials are where needed and completed forms are turned over to judges' tabulation center.
2. Prep Assistant
   a. Distribute copies of Student Instruction Sheet, Information Sheets on IRA accounts and pencils.
   b. Answer questions regarding event procedures.
   c. Do not allow participant to exceed the thirty (30) minute limit.
   d. Assist Event Manager and Proctors as needed.
3. Timer
   a. Survey participant progress to discourage any dishonest behavior.
   b. Assist Event Manager and Prep Assistant as time permits.
4. Judge - Evaluate each participant's responses to the questions provided in the evaluation sheet. - Do not "coach" the students into an answer.

Finance and Credit
Communications/Product Knowledge
Judges Information

Participant ID # ____________________

EVALUATION FORM

DID THE PARTICIPANT.....	EXCELLENT	GOOD	AVERAGE	FAIR	POOR	RATING
1. What is an IRA? (Identify IRA as being an Individual Retirement Account for a long term savings account for retirement?)	2 (Yes)			✓	(No) 0	____
2. Identify what earned income is for the qualifications of an IRA account? (Every answer mentioned receives 2 points.)	10	8	6	4	2 0	____
3. What types of IRA's are there? Identify the four types of IRA accounts. (Every answer mentioned receives 2 points.) a. Accumulation b. Spousal IRA c. Lump Sum or Rollover IRA d. Non-Rollover, Rollover IRA	8	6	4	2	0	____
4. Explain:						
a. Accumulation IRA account	20 18	16 14	12 10	8 6	4 2 0	____
b. Spousal IRA account	20 18	16 14	12 10	8 6	4 2 0	____
5. How much can one contribute to an IRA? a. Identify $2,000.00 or 100% of compensation for a total contribution to a single IRA account?	2				0	____
b. Identify $2,250.00 or 100% of compensation for a total contribution to a spousal IRA?	2				0	____
6. Answer "Yes" to the question, "If I file my IRA on April 15, 1983, can I still deduct it from my 1982 income?"	2				0	____
7. What are the age limits for IRA s? Answer 18 and/or 70½ years of age as being the eligible age to begin an IRA account?	4		2		0	____

		EXCELLENT	GOOD	AVERAGE	FAIR	POOR	RATING
8.	Explain the penalties for early withdrawal of IRA funds?	4	3	2	1	0	______
9.	Identify the exceptions to penalties for early withdrawal of funds as being? - If a member becomes permanently disabled prior to age 59½. - In case of death, the monies may be transferred to a beneficiary. - Rollover to another IRA fund at another financial institution once every 12 months.	4	3	2	1	0	______
10.	Point out some advantages of IRA accounts such as: - The amount contributed to an IRA is deducted from a person's gross income for federal tax purposes. - State and city income taxes are reduced by the same amount.	4	3	2	1	0	______
	General Greeting/Introduction of self and IRA's.	6	4	3	2	0	______
	Communicated well, using understandable language and diction.	12	9	6	3	0	______

SLC - 1982

Finance and Credit*
Mathematics
Student Instructions

COMPETENCIES

Maintain proper records of cash received and bank deposits to prevent losses.

Balance cash and total sales for the department and/or cash register at the end of the day.

Add columns of figures with facility.

Multiply and extend figures with facility.

OBJECTIVES

The participant will demonstrate his/her ability in closing out a cash drawer at the end of the day.

DESCRIPTION

The participant will close out the cash drawer by adding all deposits and cash received, and subtract all cashed checks. Evaluation will be based on the participant's correct answers from the Student Worksheet.

PROCEDURES

You are to assume the role of a cashier. You must close out your cash drawer and determine if you are over, short, or even. The following items will be provided:

a. Student Worksheet
b. Student Answer Sheet

You will be given thirty (30) minutes to close out the cash drawer and complete the student answer sheet showing your opening bank, cash received, and checks received. You must then determine if the cash drawer was over, short, or even. The student worksheet can be used for all of your calculations. Use of calculators or any other aids is prohibited. You will be evaluated on your ability to correctly compute and answer the correct figures on your Student Answer Sheet.

---

*This finance and credit event was prepared by Debbie Popo as part of an U.S.O.E. funded project.

STUDENT WORKSHEET

Opening Bank

6 rolls pennies
6 rolls nickles
3 rolls dimes
2 rolls quarters
20 ones
4 fives
1 ten

Closing Cash Drawer

227 pennies
530 nickels
85 dimes
68 quarters
124 ones
79 fives
63 tens
46 twenties
7 fifties
2 hundreds
1 $500 bill

Checks Received

27.04
198.90
27.49
16.01
76.32
397.77
4.86
457.63
68.72

674.24
766.71
675.94
11.06
114.77
73.94
9.67
111.70
369.99

99.31
26.33
6.04
129.73
16.92
76.54
96.45
288.89
334.34

36.55
8.08
7.31
4.63
19.99
5.95
6.71
26.85
34.91

Register Tape Voids

3.97
14.99
8.65
168.99

Opening Sales Register Reading $15,068.59
Closing Sales Register Reading $23,640.62

Name ______________________

STUDENT ANSWER SHEET

Opening Bank

Pennies ________

Nickels ________

Dimes ________

Quarters ________

Ones ________

Fives ________

Tens ________

Total Opening Bank ________

Closing Cash Drawer Count

Pennies ________

Nickels ________

Dimes ________

Quarters ________

Ones ________

Fives ________

Tens ________

Twenties ________

Fifties ________

Hundreds ________

$500 Bills ________

Total Cash in Drawer ________

Checks Received Total ________

Total Voids ________

What is the day's total cash receipts? ________

What is the daily sales according to
only the register reading ________

Are you over or short? (Circle)

How much? ________

SCHEDULE DETAILS

The thirty (30) minute event will proceed as follows:

0:00 - 0:30 The participants will review the Student Instruction Sheet and the Student Worksheet. The participant will close out the register and note all bank deposits and cash received, checks cashed totals, and indicate if the cash drawer balanced, was over or short on the Student Answer Sheet.

ADMINISTRATIVE SUGGESTIONS

1. A room is needed large enough to seat all participants.
2. Seating arrangements should allow for adequate space between participants.

MATERIALS/EQUIPMENT NEEDED

A. Copies of Student Worksheet

B. Copies of Answer Key

C. Copies of Student Answer Sheet

D. Pencils

E. Scratch paper (optional)

PERSONNEL NEEDED

A. Prep Assistant (1)

B. Proctors (1 for every 15 participants)

C. Graders (as needed)

RESPONSIBILITIES

1. Event Manager - This person is responsible for all major decisions necessary in this event. He/she will set up the event, brief the coordinator assistants and be responsible for all materials.

   Remember to:
   a. Be sure participant evaluation form has grader's initials and the participant's I.D. number.
   b. Be sure participants leave all materials.
   c. Turn in Student Answer Sheets to graders as soon as they are collected.

2. Prep Assistant

   a. Distribute the following items to participants:
      1. Copies of Student Worksheets
      2. Copies of Student Answer Sheets
      3. Student Instruction Sheets
   b. Answer any questions regarding event procedures.
   c. Do not allow the event to exceed thirty (30) minutes.
   d. Assist Event Manager, Proctors and Graders as time permits.

3. Proctors

   a. Survey participant's progress to discourage any dishonest actions on the part of the students.
   b. Assist Event Manager, Prep Assistant and Graders as time permits.

4. Graders - Score Student Answer Sheets using the Answer Key.

STUDENT ANSWER SHEET

Opening Bank

Pennies	$ 3.00	
Nickels	12.00	
Dimes	15.00	
Quarters	20.00	
Ones	20.00	
Fives	20.00	
Tens	10.00	
Total Opening Bank		$100.00

Closing Cash Drawer Count

Pennies	$ 2.27	
Nickels	26.50	
Dimes	8.50	
Quarters	17.00	
Ones	124.00	
Fives	395.00	
Tens	630.00	
Twenties	920.00	
Fifties	350.00	
Hundreds	200.00	
$500 Bills	500.00	
Total Cash in Drawer		$3173.27
Checks Received Total		5308.29
Total Voids		196.60

What is the day's total cash receipts?	8381.56
What is the daily sales according to only the register reading	8572.03

Are you [✓ over] or short? (Circle)

How much? $6.13

ANSWER SHEET VERIFICATION

What is the day's total cash receipts?

Cash	3173.27
Checks	5308.29
	8481.56
-Opening Bank	- 100.00
	$8381.56

What is the daily sales according to only the register readings?

Opening reading	23,640.62
Closing reading	-15,068.59
Unadjusted sales	$ 8,572.03

Are you over or short?

Cash Receipts		8381.56
Register Sales	8572.03	
-Voids	- 196.60	
Adjusted Sales		8375.43
		+ $ 6.13

Competitive Events

Food Marketing

Food Marketing*
Display/Communications
Student Instructions

COMPETENCIES

Skill in scheduling and featuring merchandise in displays at a time it is being advertised.

Skill in using mass display in setting up displays of large quantities of merchandise.

Knowledge of the use of various types of display fixtures for the most advantageous display of merchandise.

Knowledge of the principles of mass display.

Skill in communicating ideas to customers, supervisors, and co-workers.

OBJECTIVES

The student will be able to explain the best locations to place displays of items on sale and items in season taking in consideration the given store floor plan.

DESCRIPTION

The participant will show the best display locations for ten of fifteen items with four items being on sale and most of other items high volume items during a particular season. The participant will place the displays in the location which would increase total sales volume and profit. The student will explain to the judges reasons for specific locations for each item.

PROCEDURE

You are an experienced employee of a large supermarket chain. Your store manager asks you to set up two displays for the week preceding Memorial Day. You are given a choice of fifteen products to display. The manager explains that you have your choice of eight display locations at the ends of the four (4) display isles. The manager explains that the new area supervisor will be visiting the store during the week. The area supervisor will ask you to explain why you are displaying the products at the end of the isles and why in the two particular locations you choose. On the form provided, you are to tell which products would be displayed together and why you displayed them in the locations you choose. After completing the form, you will be given up to eight (8) minutes to explain to the area supervisor your reasoning for your decisions. You should consider which items are linked together especially during the spring of the year and the week before Memorial Day weekend. The sale will end 9:00 P.M. on Memorial Day. You have a total of 30 minutes to prepare your presentation.

---

*This food marketing event was prepared by Phil Cahoon, Supervisor of Dayton City Schools, Dayton, Ohio as part of a U.S.O.E. funded project.

Your choice of which five (5) products to put together at each display location should include consideration of the following:

1. Product relationship to each other.
2. Tie in of products displayed to the other products on shelves or in departments adjoining the display.
3. Traffic flow in the store.
4. Necessity of items to most shoppers.
5. Profit margin of items.
6. Ease of display with other items on isle ends.
7. Items on sale.
8. Items bought on impulse.
9. Season of year and activities of shoppers during that season.

Name ______________________ Participant # ________________

Food Marketing
Display
Work Sheet

DISPLAY I

List five items for display number one (1). Location # ______________

1. ________________________________
2. ________________________________
3. ________________________________
4. ________________________________
5. ________________________________

Display location number
1 through 8 on attached
floor plan.

Give reasons for putting five items above in same display.

____
____
____

Give reason for putting the above display in the location you chose on the attached floor plan.

____
____
____

DISPLAY II

List five items for display number two (2). Location # ______________

1. ________________________________
2. ________________________________
3. ________________________________
4. ________________________________
5. ________________________________

Display location number
1 through 8 on attached
floor plan.

Give reason for five items above in the same display.

____
____
____

Give reasons for putting the above display in the location you chose on the attached floor plan.

____
____
____

Food Marketing
Display
Fact Sheet

DISPLAY ITEMS

ITEM	PROFIT MARGIN
1. Carpet Shampooer Rental	40 %
2. Heavy Duty Paper Towels (On sale)	8 %
3. Hot dogs	25 %
4. Paper plates	29 %
5. Charcoal	25 %
6. Mops	27 %
7. Pork and Beans (On sale)	10 %
8. Lysol Cleaner	23 %
9. Dog Food (25 lb. bags)	28 %
10. Mustard (On sale)	16 %
11. Windex Glass Cleaner (On sale)	12 %
12. Sweet Pickles	24 %
13. Vegetable & Flower Seeds	27 %
14. Sponges	30 %
15. Carpet Deodorizer	27 %

SUPPLIES/EQUIPMENT

1. Work Sheets/Floor Plans

PERSONNEL

1. Timer (1)
2. Judges (6)
3. Supervisor (3) (Customer)
4. Prep-Room Assistant

TIMING

Preparation - 30 minutes

Presentation - 8 minutes

Judging time - 2 minutes

Food Marketing
Display/Communications
Judges Instructions

1. Participants are to have thirty (30) minutes to complete the activity just prior to their eight minute maximum oral explanation of their choices.

2. Judges are to use the evaluation form during the oral explanation to question participants.

3. Participants may refer to the work sheet of their activity during the oral explanation.

4. At the conclusion of the oral explanation, the participant is to give you their work sheet to which you will staple the oral evaluation form.

5. A maximum of 100 points are to be awarded for this activity.

6. As the participant starts the oral explanation, ask the participant his or her participant number to be sure you have the correct number on the evaluation sheet.

RATIONALE FOR ANSWERS:

Picnic supplies (pork & beans, mustard, sweet pickles, paper plates and charcoal) should be located in location number 5 for the following reasons:

a. Across from the prepacked cold meats, picnic high profit items.

b. In early part of traffic flow when cart is empty and money not exhausted yet.

c. Display at end of isle of related items, canned fruit & vegetable and condiments glass items.

House cleaning supplies (heavy duty paper towels, Windex cleaner, Lysol cleaner, sponges, and carpet deodorizer) should be located in location #2 for the following reasons:

a. At end of isle of related items cleaning supplies and paper products.

b. Next to cash register where shoppers buy more what they will need but may have forgotten.

c. Location where shoppers need to be encouraged to buy with use of sale items. You can always use paper towels and Windex, especially if you can get them at a reduced price.

Reasons for choosing display of picnic related items are:

a. Time of year (just before Memorial Day) start of picnic season.

b. Items fit together as picnic items.

c. Suggested in instructions to participants by emphasizing time of year and holiday.

Reasons for choosing display of house cleaning items are:

a. Suggested in instructions by emphasizing activities done in spring.

b. Items fit together as house cleaning items.

c. Heavy duty paper towels and Windex cleaner do not tie in with other sale items.

The following items should not be chosen because:

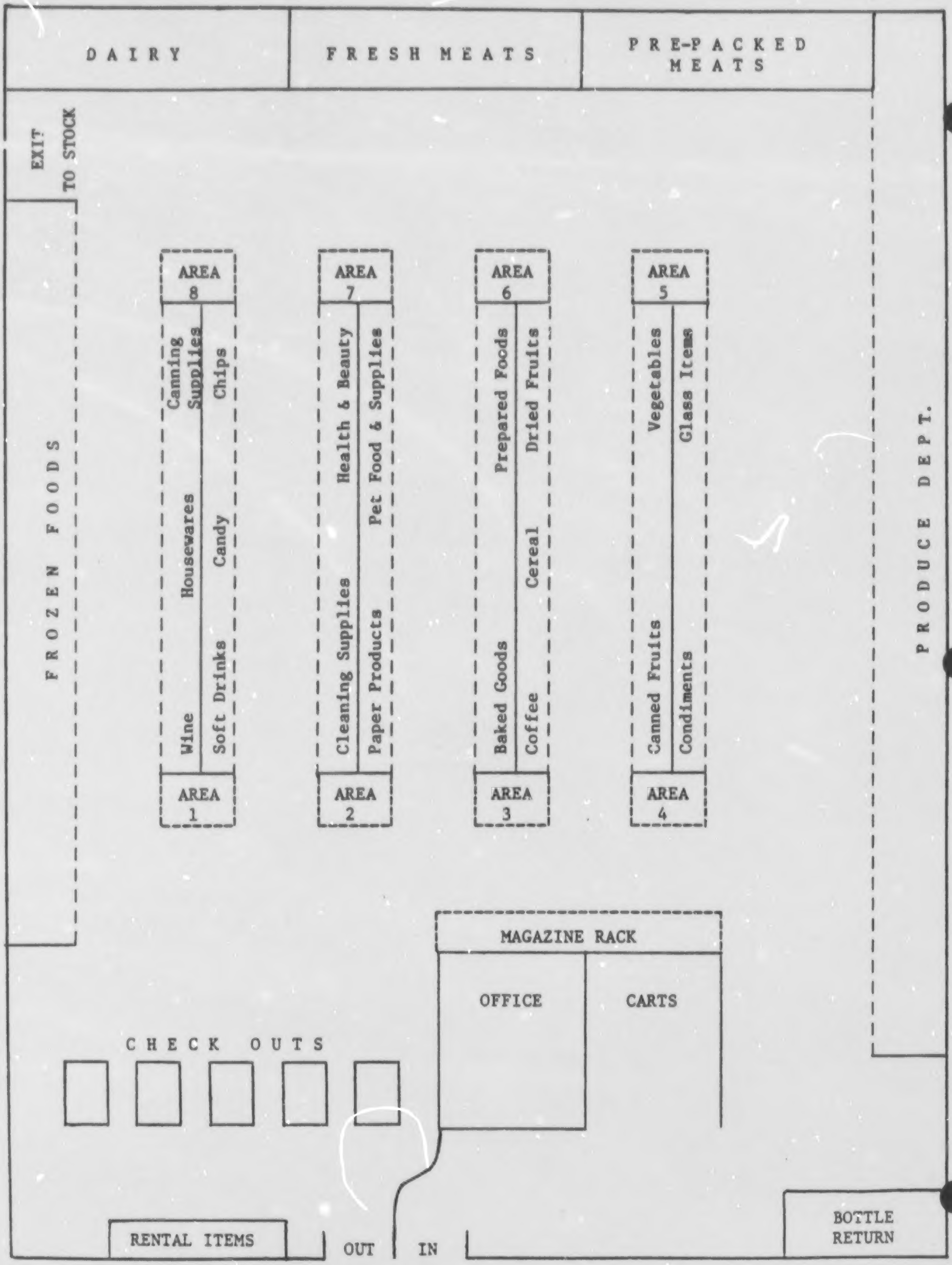
Dog food does not tie in with any other item to be displayed, plus it is too bulky to display well at end of isle with other items.

Carpet shampooer rental goes with spring cleaning but cannot be displayed on the end of an isle with four (4) other items.

Hot dogs must be refrigerated and would not be displayed at end of isle but rather in meat case.

Vegetable and flower seeds do not tie in with other items, plus usually are in own display racks.

Mops must be displayed in special racks that are not suited for the end of isle displays.


DAIRY
FRESH MEATS
PRE-PACKED MEATS
EXIT TO STOCK
FROZEN FOODS
AREA 8
Canning Supplies
Chips
Housewares
Candy
Wine
Soft Drinks
AREA 1
AREA 7
Health & Beauty
Pet Food & Supplies
Cleaning Supplies
Paper Products
AREA 2
AREA 6
Prepared Foods
Dried Fruits
Cereal
Baked Goods
Coffee
AREA 3
AREA 5
Vegetables
Glass Items
Canned Fruits
Condiments
AREA 4
PRODUCE DEPT.
MAGAZINE RACK
OFFICE
CARTS
CHECK OUTS
RENTAL ITEMS
OUT
IN
BOTTLE RETURN

Participant # ____________________

Food Marketing
Display/Communications
Evaluation

Judge's Initials ________

1. Student identified one of the displays as picnic items	10 (Yes)		0 (No)		____
2. Student listed correct items in picnic display	10 (all 5)	7 (4 items)	3 (3 items)	0 (less)	____
3. Student identified one of the displays as housecleaning items	10 (Yes)		0 (No)		____
4. Student listed correct items in housecleaning display	10 (all 5)	7 (4 items)	3 (3 items)	0 (less)	____
	Excellent	Very Good	Good	Poor	
5. Student explained choice of picnic items effectively	10-9	8-7-6	5-4-3	2-1-0	____
6. Student explained location of picnic display effectively	10-9	8-7-6	5-4-3	2-1-0	____
7. Student explained choice of housecleaning items effectively	10-9	8-7-6	5-4-3	2-1-0	____
8. Student explained location of housecleaning display effectively	10-9	8-7-6	5-4-3	2-1-0	____
9. Student communicated effectively with supervisory	20-16	15-11	10-6	5-0	____
				TOTAL	____

COMPETENCIES

Knowledge of mathematical manipulations up to and including first degree algebraic expressions.

Ability to determine the price of merchandise being purchased in a lesser quantity than that originally multiple priced.

Skill in accurately calculating the exact amount of a customers purchase.

Skill in using and translating percentages.

Skill in reading and interpreting self computing scales that speed up mathematical procedures such as tax computation charts.

OBJECTIVES

1. You are to demonstrate your ability to compute the total cost of items given the price per pound and a set of scales to weigh them.
2. You are to demonstrate your ability to reduce the cost per pound by a given percentage and then compute the total cost of each item using the new reduced cost.

DESCRIPTION

Participants will be given ten (10) items of various weights. Each of the ten (10) items will be identified by their number. Participant is to weigh each item and compute the total cost of item at a given price per pound for each item. After computation is completed the store manager cuts the price per pound of each item by different percentages. After the manager informs the participant of a new price list the participant is to compute the new total cost of each item.

In short the ten (10) items are weighed and then priced two times.

PROCEDURES

You are an employee in the produce department of a supermarket. You are given direction by your manager to figure the total cost of each of ten items given a specific cost per pound for each item. You are directed to write the costs on a form provided showing the weight of each item and the total cost of each item.

Then after you completed this pricing your manager asks you to reduce each item by a specific percentage for each item. You are directed to compute the total cost of each item using the reduced cost per pound on a second form. The manager will give you ten minutes total to compute both sets of prices. If you have time add up the total cost of all ten items. You will be given two minutes to become familiar with the scales. You may weigh sample items and ask questions of the manager (Judge) concerning the reading of the scales.

ADMINISTRATIVE SUGGESTIONS

You will play the role of produce manager.

You will give each participant a two minute period of time to become familiar with the scales. Answer any questions they may have concerning the reading of the scales. Participants may weigh samples provided. Upon the instruction of the timer you are to hand the participant a box containing ten items each labeled from one (1) through ten (10). You will also give them Evaluation Form #1 which lists the cost per pound of each of the ten items. Instruct the participants to weigh each item and record weight on the form and to compute the total cost and record on the form as quickly as they can. Instruct them to tell you immediately upon completing the recording. As soon as the participants inform you they have completed their computation, give them the second Evaluation Form #2. Explain that the store manager just reduced the items and they should refigure the total costs using the percentages provided on the form.

Allow a total of ten minutes for both sets of computations. (The two minutes to become familiar with the scales not included.)

1. Scoring:
    A. Each correct weight would receive 3 points for total of 30 points.
    B. Each correct total item price would receive 3 points for total of 30 points for each price or total of 60 points for both.
    C. Totals will be scored at 5 points each (10 points total).
2. This event should be scheduled every 30 minutes.
3. Have each judge weigh each item on the scales they will be using. Then compute the total item costs and total costs of all ten items. This will familiarize judges with procedure and double check scales to see if any are out of adjustment. If any are out of adjustment make up new answer key for that set of scales.
4. Provide minimum of 3 preferably 4 sets of scales, boxes of ten numbered items, sample weights, and judges.
5. Have tables large enough for scales, box of items and room for the participant to lay Evaluation Forms while writing. No less than six foot long tables.
6. Have a timer that starts and stops all sections at same times.

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*This food marketing event was prepared by Phil Cahoon, Supervisor of Dayton City Schools, Dayton, Ohio, as part of a U.S.O.E. funded project.

Name ____________________________ Participant # ____________

Food Marketing
Mathematics
Answer Sheet

EVALUATION FORM #1

ITEM #	COST PER POUND	WEIGHT OF ITEM (3 pt.)	TOTAL COST OF ITEM (3 pt. each)	
1.	$ .34			1.
2.	$ .49			2.
3.	$1.69			3.
4.	$ .99			4.
5.	$ .79			5.
6.	$2.09			6.
7.	$2.69			7.
8.	$ .59			8.
9.	$1.29			9.
10.	$2.59			10.
		TOTAL COST OF ALL TEN		(5 pt.)

TELL THE PRODUCE MANAGER AS SOON AS YOU FINISH THIS SHEET.

Name ______________________

Participant # __________

Food Marketing
Mathematics
Answer Sheet

EVALUATION FORM #2

ITEM #	ORIGINAL COST PER POUND	PERCENT OF PRICE REDUCTION	NEW TOTAL COST OF ITEM (3 pt. each)	
1.	$ .34	10 %	________	1.
2.	$ .40	20 %	________	2.
3.	$1.69	30 %	________	3.
4.	$ .99	5 %	________	4.
5.	$ .79	25 %	________	5.
6.	$2.09	11 %	________	6.
7.	$2.69	8 %	________	7.
8.	$ .59	50 %	________	8.
9.	$1.29	6 %	________	9.
10.	$2.59	15 %	________	10.

TOTAL COST OF ALL TEN ________ (5 pt.)

GRAND TOTAL SHEETS 1&2 ________

Competitive Events

Food Service

Ohio DECA
SLC 79

Food Service*
Operations
Event Manager Instructions
Page 1

DESCRIPTION

The participant, role playing as a restaurant master-employee, is handed a suggestion card by a customer who has already paid the check. The customer has made a complaint on the suggestion card that the restaurant's housekeeping is only fair. After the employee's (participant) discussion with the customer, the manager inquires about the nature of the customer's complaint. As the master-employee (participant) was responsible for housekeeping duties during the past week, the manager asks the participant to review his/her responsibilities, understanding of the health and sanitation laws and regulations and their affect upon customer patronage.

OBJECTIVES

The participant will demonstrate competencies in operation skills by:

1. satisfactorily answering the customer's questions and complaints regarding the housekeeping conditions of the restaurant
2. demonstrating an attitude towards the customer that a high level of sanitation is necessary to maintain customer patronage
3. suggesting ways to correct customer's complaints when speaking with the manager
4. listing at least three responsibilities an employee has in helping to assure the restaurant meets with the laws and regulations of health and sanitation
5. discussing possible consequences of customer patronage and a health and sanitation department inspection under the present conditions thereby, demonstrating an understanding of the laws and regulations of health and sanitation and their affect upon customer patronage

SCHEDULE DETAILS

See attached event schedule for time assignments for all students.

See map for location of all personnel.

MATERIALS

Instructions (Event Manager, student, judge)
Evaluation Sheets
Manager Fact Sheet
Customer Fact Sheet
Student Handout

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*This food marketing event was prepared by Phil Cahoon, Supervisor of Dayton City Schools, Dayton, Ohio as part of a U.S.O.E. funded project.

RESPONSIBILITIES

Event Manager - This person is responsible for all major decisions necessary in this event. He/she will set up the event, brief the judges and coordinator assistants and be responsible for all materials.

Remember to:

1. Follow student time schedules exactly
2. Be sure participant evaluation form has judge's initials and the participant's I.D. number
3. Be sure participants leave all materials
4. Total evaluation forms as they are collected from the judges
5. Turn in evaluation forms to Tabulation Center regularly throughout the event

Prep Room Assistant

1. The proctor has the responsibility of answering any questions the student may have
2. A new group of (3) three students will arrive every (15) fifteen minutes
3. Each student will be given a set of student instructions
4. Be sure to tell each student that he/she has (10) ten minutes to read these instructions and to ask any questions
5. Remind them to carefully read all instructions.
6. Be sure that you, as the proctor, are familiar with all items that you have to answer
7. When a new student comes in, check the time sheet to make sure the right persons are there
8. At the end of the (10) ten minutes take the contestants to the participation room
9. Assist the event manager as time permits

Customer and Manager

1. Follow instructions on the script.
2. Review the evaluation forms before students participate
3. Be as consistent as possible in dealing with each student
4. Avoid dragging out the conversation. Each student is limited to (5) five minutes with each the customer and the manager.

Ohio DECA
SLC 79

Food Service
Operations
Student Instructions

OBJECTIVES:

You will demonstrate competency in operation skills by:

1. satisfactorily answering the customer's questions and complaints regarding the housekeeping conditions of the restaurant
2. demonstrating an attitude towards the customer that a high level of sanitation is necessary to maintain customer patronage
3. suggesting ways to correct customer's complaints when speaking with the manager
4. listing at least three responsibilities an employee has in helping to assure the restaurant meets with the laws and regulations of health and sanitation
5. discussing possible consequences of customer patronage and a health and sanitation department inspection under the present conditions thereby, further demonstrating an understanding of the laws and regulations of health and sanitation and their affect upon customer patronage

PROCEDURES

1. You will be given ten (10) minutes to study the problem and a total of ten (10) minutes to role play the situation. During the ten (10) minute period, five (5) minutes will be spent with the customer and five (5) minutes with the manager.
2. You are to begin the role playing situation by accepting a suggestion card from a customer who has already paid the check. The customer has complained that the restaurant's housekeeping is only fair. After a discussion with the customer, the manager inquires about the nature of the customer's complaint. As you were responsible for the restaurant's housekeeping duties for the week, the manager asks you to review your responsibilities and possible consequences of customer patronage, etc. of current conditions. You must demonstrate, through discussion with the customer and manager, your competencies in operation skills

COMPETENCIES

1. Understanding the health and sanitation laws and regulations with which restaurants must comply.

2. Attitude that a high level of sanitation is necessary to maintain customer patronage.

OBJECTIVES

The participant will demonstrate competencies in operation skills by:

1. satisfactorily answering the customer's questions and complaints regarding the housekeeping conditions of the restaurant

2. demonstrating an attitude towards the customer that a high level of sanitation is necessary to maintain customer patronage

3. suggesting ways to correct customer's complaints when speaking with the manager

4. listing at least three responsibilities an employee has in helping to assure the restaurant meets with the laws and regulations of health and sanitation

5. discussing possible consequences of customer patronage and a health and sanitation department inspection under the present conditions thereby, demonstrating an understanding of the laws and regulations of health and sanitation and their affect upon customer patronage

PROCEDURES

The participant will be given ten (10) minutes to study the problem and ten (10) minutes to demonstrate an understanding of the importance of health and sanitation regulations through role playing. You are to evaluate each participant, using the form provided, on how well the student demonstrates the given competencies in operation. Be sure to judge only those competencies as listed.

Ohio DECA
SLC 79

Food Service
Operations
Evaluation Sheet
Page 1

INSTRUCTIONS: For each point, circle the number in each row which most nearly describes the participant's competency in that area.

EVALUATION CRITERIA

Excellent - student would rank as one of the top persons employed in this industry; did a truly superior job.
Good - student did very well; very acceptable work
Fair - student did okay and would be ranked about average for person employed in food service
Below Average - student was somewhat ineffective or ignored the situation; definitely a below average worker.
Unacceptable - student was totally ineffective; perhaps this student should not be employed in food service.

I. Participant's understanding of customer complaint	POOR	FAIR	GOOD	VERY GOOD	EXCELLENT
displayed an attitude of concern in regard to customer's complaint	1	2	3	4	5
listened to the customer's complaint attentively	1	2	3	4	5
answered the customer's complaints satisfactorily and assured the customer the situation would be corrected	1	2	3	4	5
answered customer's questions regarding health and sanitation laws and regulations satisfactorily	1	2	3	4	5

subtotal ________

II. Participant's understanding of the affects of sanitation upon customer patronage and possible restaurant licensing

	POOR	FAIR	GOOD	VERY GOOD	EXCELLENT
demonstrated an attitude that a high level of sanitation is necessary to customer patronage when speaking with the customer	1	2	3	4	5
demonstrated an understanding that a high level of sanitation is necessary to customer patronage when speaking with the manager	1	2	3	4	5
demonstrated an understanding of possible consequences of an inspection by the State Board of Health under present conditions when speaking with the manager	1	2	3	4	5

subtotal ________

III. Participant's understanding of his/her responsibilities as a master-employee in regard to the keeping of health and sanitation laws and regulations.

displayed an attitude of concern and responsibility for the customer's complaint when discussing problem with the manager	1	2	3	4	5
knowledgeable of how to correct customer's complaint	1	2	3	4	5
listed at least three (3) responsibilities or duties an employee has in assuring the restaurant meets with health and sanitation laws and regulations	1	2	3	4	5

subtotal ________

(total possible-50) TOTAL ____________________

Ohio DECA
SLC 79

Food Service
Operations
Manager Fact Sheet

MANAGER FACT SHEET

This week you have assigned the master-employee (participant) with the responsibility of the restaurant's housekeeping to insure health and sanitation laws and regulations. After overhearing a customer making a complaint, you ask the master-employee about the nature of the complaint after the customer leaves. When you learn that the complaint involves the lack of cleanliness in the restaurant, you discuss and review the importance of the health and sanitation laws and regulations with the master-employee. You should also discuss the affect of the restaurant's present condition upon customer patronage by asking questions of the employee.

In your conversation with the master-employee (participant) consistently include the following:

1. what are your responsibilities in assuring the restaurant meets with the laws and regulations of health and sanitation?
2. what improvements can you make to correct the customer's complaint?
3. what might the consequences be if a representative of the State Board of Health were to inspect the restaurant under it's present conditions?
4. what are the consequences of the restaurant's present condition to customer patronage?

Ohio DECA
SLC 79

Food Service
Operations
Customer Fact Sheet

CUSTOMER FACT SHEET

You are at the counter, but have already paid your check. You are to hand the master-employee (participant) a suggestion card on which you have complained about the restaurant's housekeeping. You are to discuss your complaints with the employee. In your conversation with the master-employee (participant) consistently include the following:

1. complain about the cleanliness of the dinnerware and table
2. complain about the unsanitary conditions of the restroom
3. ask who is responsible for the restaurant's housekeeping and ask why it is in its present condition
4. inquire about the regularity with which the Board of Health representative visits the restaurant to inspect it

Ohio DECA
SLC 79

Food Service
Operations
Student Handout

WELCOME TO THE

LUCKY BUCK RESTAURANTS, INC.

In the interest of maintaining and improving our standards of food, service and cleanliness we would appreciate it if you would note your comments and suggestions and return by mail. Thank you!

I ordered: ______________________________

Food was: Very Good ☐ Good ☐ Fair ☐

Waitress' Name: ______________________________

Waitress was: Friendly: __________ Efficient: ______________

Service was: Very Good ☐ Good ☐ Fair ☐

Our restaurant's housekeeping was: Very Good ☐ Good ☐ Fair ☑

Any other comments about our food, service or [✓ housekeeping]

table + dinnerware were not clean - condition of restrooms poor!

What encouraged you to dine with us:

Reputation ☐
Advertisement ☐
Road Sign ☐

Suggestion of a Friend ☐
Appearance of Building ☐
Other ☐

I am: Local Resident ☐ In town on business ☐ Tourist ☐

I visited you on ____________________ at ____________ AM ☐ PM ☐

(optional:) Name ____________________ Street ______________

101 City: ____________________ State ______________

Competitive Events

General Merchandising

COMPETENCIES

Interpret merchandise guarantee and directions to customers.

OBJECTIVES

The participant will demonstrate product and service technology skills in the occupational category of general merchandise by:

1. answering the questions asked by the customer about the warranty,
2. understanding and interpreting to the customer the terms and conditions of the warranty, and
3. understanding and interpreting to the customer where to have the watch serviced.

PROCEDURES

You are to listen to a customer who has purchased a watch but does not completely understand the warranty. The last watch bought was not covered by a warranty. The customer wants to understand what he/she can do if the watch stops working.

1. You will be briefed by the event chairperson.
2. You should familiarize yourself with the Evaluation Sheet; so you will become aware of what will be evaluated.
3. Each evaluation will begin when the participant is in place behind the counter.
4. The customer will approach the participant who is acting as a salesperson in the jewelry department. At this point, the event will begin.
5. The purpose of this event is for the participant to explain the warranty which accompanied a watch purchased.
6. On approach to the salesperson, the customer should begin the conversation. After the introduction and/or greeting, he/she will simply begin by saying, "I bought a watch here yesterday and when I got home and read the Warranty, I was a little confused. Would you mind explaining it to me?"

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* This food marketing event was prepared by Phil Cahoon, Supervisor of Dayton City Schools, Dayton, Ohio as part of a U.S.O.E. funded project.

7. The conversation should be a series of explanations by the participant about the Warranty. The customer should be prepared to ask certain questions. Examples of possible questions are:

   a. Is it warranted for 12 months or 18 months?
   b. If I drop it and it breaks, can I send it back?
   c. What happens if it does stop running - do I get another watch?
   d. What does "void" mean?
   e. If it needs to be repaired, where do I send it - or can I take it somewhere here in town?
   f. If I have to send it off, do I just put it in an envelope and mail it?

   These or other questions may be used. The customer should try to be consistent with each participant. Be sure to review the Evaluation Sheet. You should hear the information needed from the participant.

8. As soon as the customer feels all of the items on the Evaluation Sheet have been covered, he/she may end the event with a closing statement and leave the evaluation area.

   NOTE: Each participant is allowed 5 minutes for this part of the event. The timer should signal you when time is up.

9. When the event is over, evaluate each participant. The timer will collect the Evaluation Sheets from you.

Evaluate the participant on his/her product and service technology skills as related to the following criteria:

Excellent - the participant offered the information wholeheartedly; was confident; did not have to be asked; left the customer totally informed.
Above Average - the participant offered information without being asked but only offered necessary information (not voluntary information).
Average - the participant was asked by the customer to explain or to clarify. The information was offered by the participant but still failed to satisfy the customer completely.
Below Average - the participant was not confident in giving information and did not really understand the warranty. He/she offered limited help to the customer.
Unacceptable - the participant offered no information on this item; or when asked by the customer, he/she had no reply.

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Ohio DECA
SLC - 79

General Merchandising
Prod. & Serv. Tech
Student Instruction Sheet

OBJECTIVES

The participant will demonstrate product and service technology skills in the occupational category of general merchandise by:

1. answering the questions asked by the customer about the warranty,

2. understanding and interpreting to the customer the terms and conditions of the warranty, and

3. understanding and interpreting to the customer where to have the watch serviced.

PROCEDURES

You are to assume the role of a salesperson in the jewelry department of a general merchandise store. You have just been approached by a customer who is concerned about the warranty on his watch which he/she purchased yesterday.

1. You will be given ten (10) minutes for the briefing session. During this time frame, you are also to familiarize yourself with a watch warranty which will be provided. You may take the warranty sheet with you into your event.

2. You will be shown to the evaluation area by the proctor.

3. You will be standing behind a counter or table, acting as if it were a sales counter in the jewelry department.

4. A customer will approach you with a problem concerning the warranty covering a watch he/she purchased.

5. You will be evaluated on interpreting the warranty. You will help the customer understand the information included in the warranty.

Ohio DECA
SLC - 79

General Merchandising
Prod. & Serv. Tech
Student Handout

WARRANTY

Your TIMECO WATCH is warranted for a period of one year against defects in material and workmanship by Timeco Corporation-not by the dealer from whom it was purchased.

Any TIMECO developing such defect within this period will be repaired (i.e. a thoroughly reconditioned and inspected movement will be put into your case) or replaced (a watch of equal value and similar appearance will be supplied) at our option provided it is returned to us with $1.50 to cover the cost of handling. (This is not a repair charge.) No additional charge will be made unless the one year warranty period has expired or servicing is necessary for reasons beyond our control, in which case a moderate additional charge will be made.

This warranty is void in the case of watches that have been wet (water resistent models excepted), tampered with, taken apart, improperly oiled, or otherwise ill-treated.

TIMECO CORPORATION

HOW TO CARE FOR YOUR TIMECO WATCH

1. Wind it fully every day, preferably at the same hour. (This does not apply to selfwind models.)
2. Have it checked annually to determine whether cleaning or servicing is necessary.
3. Should crystal become cracked have it replaced at once.

SERVICE

For cleaning and repair, quick, competent service can be provided by your nearby jeweler, watch repairman, or one of the 600 Timeco Authorized Watch Service Centers. (For the address of Service Center located near you, look in the yellow pages of the telephone directory.) Alternatively, watch may be mailed to our Factory Service Center for repair or replacement at our option.

For service under the warranty, watch may be taken to a Timeco Authorized Watch Service Center or mailed to our Factory Service Center:

T. Corp - P.O. Box 2740
Little Rock, Ark. 72203

For safer and faster service we advise you to use first class or air mail. Because of the increased percentage of losses occurring in the Postal Service, we recommend registering or insuring your package. If you do not receive an acknowledgment of its receipt within a reasonable time, start a tracer with the Post Office.

Ohio DECA
SLC - 79

General Merchandising
Prod. & Serv. Tech
Evaluation Form

______________ Judges Name ____________________ Total Points

______________ Participant # ____________________ Participant Name

1. To what degree did the participant explain the length of the warranty?

Unacceptable	Below Average	Average	Above Average	Excellent
0-1-2	3-4	5-6	7-8	9-10

2. To what degree did the participant explain the conditions under which the watch would be fixed?

Unacceptable	Below Average	Average	Above Average	Excellent
0-1-2	3-4-5-6	7-8-9-10-11-12-13-14	15-16-17-18	19-20

3. To what degree did the participant explain the word "void"?

Unacceptable	Below Average	Average	Above Average	Excellent
0-1-2	3-4-5	6-7-8-9-10	11-12-13	14-15

4. To what degree did the participant explain whether another watch would be given to the customer if something went wrong with his/her watch?

Unacceptable	Below Average	Average	Above Average	Excellent
0-1-2	3-4-5-6	7-8-9-10-11-12-13-14	15-16-17-18	19-20

5. To what degree did the participant explain where the customer may send or take the watch for repairs?

Unacceptable	Below Average	Average	Above Average	Excellent
0-1-2	3-4-5-6	7-8-9-10-11-12-13-14	15-16-17-18	19-20

6. To what degree did the participant explain how the watch should be mailed when sending for repairs?

Unacceptable	Below Average	Average	Above Average	Excellent
0-1-2	3-4	5-6	7-8	9-10

7. Overall, did you as a customer leave feeling that everything was explained clearly?

_____Yes (5) _____No (0)

Competitive Events

Petroleum

COMPETENCIES

1. Skill in showing a genuine interest in the customer's problem.
2. Knowledge of the ways to show that an item of merchandise is suited for the purpose the customer has in mind.
3. Understanding of the ways to interpret the features of a product in terms of benefits to the customer.
4. Attitude that a salesperson must have sufficient knowledge of the merchandise they sell in order to answer a customer's questions satisfactorily.

OBJECTIVES

The participants will demonstrate their ability to persuade the customer to purchase a product that will best satisfy their needs.

DESCRIPTION

The participant will be assigned the role of a salesperson in a tire store. The salesperson will be approached by a customer who wishes to purchase two new tires for the car. The salesperson must persuade the customer to purchase the tires provided.

PROCEDURES

You will assume the role of a salesperson in a tire store. A customer will enter and ask for your assistance in selecting tires. A Product Fact Sheet will be provided for the tires that you must sell. You will be given ten (10) minutes to prepare for the event and review the Product Fact Sheet. You will then be directed to the participation area. A table/counter has been set up in the participation area. The tires that you are to sell are placed on the table/counter. The customer will approach you and during the next eight (8) minutes, you must present the product in an effort to complete a sale.

You are not required to continue after the customer has agreed to purchase the tires. When the customer is ready to buy, direct the customer to the front desk to pay for and pick up the tires.

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*This service station retail event was prepared by William Krosky as part of a U.S.O. E. funded project.

You are to assume the role of a customer in a tire store. You approach a salesperson (the participant) and ask for assistance in purchasing two new tires. During your eight (8) minute conversation with the salesperson, be sure to follow these guidelines:

1. Explain that the tires in your car must be replaced.
2. If asked what type of car you drive, provide this information:
    a. 1979 Dodge Omni
    b. 4-cylinder
    c. Your car now has 180-13R tires
    d. You drive 20,000 miles a year
3. State that your last tires lasted less than the guarantee had indicated and that the store where you purchased them refused to honor the guarantee.
4. Ask about the guarantee on these tires:
    a. How long are they good for?
    b. Will the store replace the tires free of charge if they do not last as long as the guarantee implies?
5. Ask why the tires are so expensive.
6. Agree to purchase the tires, but only after all of your questions/comments have been addressed and the participant has had ample time to complete the sale.
7. Do not allow the conversation to go beyond eight (8) minutes. The participant should ask you to pay for and pick up your tires at the front desk.

Participant #____________

Service Station Retail
Selling
Evaluation Form

JUDGE'S INITIALS__________

DID THE PARTICIPANT . . . .

	EXCELLENT	GOOD	AVERAGE	FAIR	POOR	RATING
1. Open and close the sale adequately?	12 11	10 9	8 7 6 5	4 3	2 1	______
2. Demonstrate a genuine interest in the customers problem?	12 11	10 9	8 7 6 5	4 3	2 1	______
3. Demonstrate concern that the customer needs tires to fit driving conditions?	12 11	10 9	8 7 6 5	4 3	2 1	______
4. Convert product features into customer benefits?	12 11	10 9	8 7 6 5	4 3	2 1	______
5. Possess adequate information about tires?	12 11	10 9	8 7 6 5	4 3	2 1	______
6. Respond to customer questions effectively?	12 11	10 9	8 7 6 5	4 3	2 1	______
7. Develop confidence in the mind of the customer that the information provided was valid?	12 11	10 9	8 7 6 5	4 3	2 1	______
8. Demonstrate an overall ability to respond to the customer's needs in an effective manner?	16 15	14 13 12	11 10 9	8 7 654	3 2 1	______
					TOTAL POINTS	______

SCHEDULE DETAILS

The twenty (20) minute event will proceed as follows:

0:00 - 0:10 The participant will review the Student Instruction Sheet and the Product Fact Sheet.

0:10 - 0:18 The participant will be directed to the participation room where the performance segment will take place.

0:18 - 0:20 The judges will rate student performance on the evaluation forms provided.

ADMINISTRATIVE SUGGESTIONS

1. Preparation room is needed for the ten (10) minute review of Student Instruction Sheet and Product Fact Sheet.
2. Participation room is needed for the eight (8) minute performance segment. A counter/table should be provided with the selected tires placed on this. The room arrangement should allow judges to view and hear the performance process.
3. See that judges get a copy of Product Fact Sheet.

MATERIALS/EQUIPMENT NEEDED

1. Tire selections
2. Copies of Product Fact Sheet (this must be developed after the tires have been selected.)
3. Copies of Customer Script
4. Counter/Table
5. Stop watches (3)

PERSONNEL NEEDED

1. Prep Room Assistants (2)
2. Timers (3)
3. Customers (3)
4. Judges (6)

RESPONSIBILITIES

A. Event Manager - This person is responsible for all major decisions necessary in this event. They will set up the event, brief all personnel, see that schedules are followed, materials are where needed and completed forms are turned into tabulation center.

B. Prep Room Assistants

1. Greet students and check their schedules to confirm correct order.
2. Give each participant a copy of the Student Instruction Sheet and the Product Fact Sheet.
3. Do not allow the preparation period to extend beyond ten (10) minutes.
4. Direct participants to the participation room at the end of the preparation period.
5. Assist the event manager as time permits.

C. Timer

1. Do not allow the performance segment to extend beyond eight (8) minutes.
2. Assist the event manager as time permits.

D. Customer

1. Follow Customer Script
2. Be as consistent as possible with each participant.

SLC - 1982

Service Station Retail*
Communications
Student Instructions

COMPETENCIES

Communicate with customers, supervisors and others.

Avoid misrepresentation of products and policies.

Convey a positive image of self and firm.

Demonstrate appropriate knowledge of credit/credit default transactions.

Skill in maintaining an objective point of view in problem situations.

OBJECTIVES

The participant will effectively explain store policies pertaining to credit and payment of merchandise.

DESCRIPTION

The participant will be assigned the role of a salesperson in a full service gasoline station. The participant will be required to explain to a customer that the credit card offered cannot be accepted.

PROCEDURES

You are a salesperson in a full service gasoline station. A frequent customer has stopped in to the station for two (2) new tires. After mounting the tires and presenting the bill, you must "call in" for credit card approval. Your company tells you the purchase is over the limit allowed for this customer and cannot be accepted.

After fully examining the above information and the company policy sheet, you will be given five (5) additional minutes to determine your plan of action with the customer. Please make your conversation with the customer within eight (8) minutes or until purchasing solution is mutually agreed upon.

You, as a participant, have the authority to suggest a solution to the problem in accordance to company policies.

COMPANY POLICY SHEET

1. Treat each customer as an individual so as to attract repeat business.
2. Accept only store credit cards for any purchase but remember to call for authorization.
3. Purchases are to be "paid in full" before released to customers.
4. Checks and other major company credit cards are not accepted for payment on any merchandise.

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*This service station retail event was prepared by William Krosky as part of a U.S.O.E. funded project.

SPEEDISET® MOORE BUSINESS FORMS INC., 76

GUARANTEED SERVICE

(GUARANTEE DETAILS ON REVERSE SIDE)

NEW CAR OWNERS

"RETAIN THIS RECORD FOR YOUR WARRANTY PROTECTION"

CUSTOMER	
DATE	5/3/82
MILEAGE	43 782
CUSTOMER TELEPHONE NO.	406-34[illegible]
CUSTOMER'S AUTHORIZATION	
SERVICED BY	

VEHICLE SERIAL NO.	
YEAR—MAKE—MODEL	1979 · Buick
LICENSE NO.	379-WHZ
DATE	5/3/82
MILEAGE	43 782
LUBRICATED ☐	OIL CHANGED ☐

DEALER STAMP

NAME

STREET ADDRESS

CITY STATE ZIP CODE

WORK ORDERED	WORK DONE	PRODUCTS	QTY.	UNIT PRICE	AMOUNT
		MOTOR OIL ☐ SUPERIOR ALL SEASON			
		MOTOR OIL ☐ ALL SEASON ☐ HEAVY DUTY			
		ANTIFREEZE & COOLANT			
PART NO.		**PARTS & ACCESSORIES**			
		OIL FILTER			
		AIR FILTER			
		GASOLINE FILTER			
		PCV VALVE			
		w/s/w 195 R 78 TIRES	2	42.50	85.00
		(Spin Balance)			
TOTAL PRODUCTS—PARTS & ACCESSORIES					85.00

WORK ORDERED	WORK DONE	SERVICES	AMOUNT
		CAR CARE LUBRICATION	
		TIRES: ☐ REPAIR ☐ ROTATE	
		WHEEL BALANCE	
		CAR WASH	
		ENGINE TUNE-UP	
		WE RECOMMEND	
		TOTAL SERVICES	
		→ ENTER TOTAL PRODUCTS, ETC. HERE →	85 [illegible]
		SUPREME ☐ MILEMAKER ☐ LEAD-FREE ☐ QTY UNIT PRICE	
		TAX	4 [illegible]
		TOTAL AMOUNT ☐ CASH ☒ CREDIT CARD	[illegible]

SAFETY CHECKED

☒ TIRES ☒ MUFFLER ☐ FAN BELT

☐ BATTERY ☐ LIGHT BULBS ☒ SHOCK ABSORBERS

☒ BRAKES ☒ TAIL PIPE ☐ WIPER BLADES

FORM 1830 REV. 9-71

THANK YOU . . . M 5705497

"CHECK CAR CARE GUIDE FOR NEW CAR WARRANTY REQUIREMENTS"

BEST COPY AVAILABLE

You are to assume the role of a customer in a full service gas station. You have just purchased two new tires -- they have been mounted on your auto.

SITUATION

1. You used a store credit card to purchase tires from a service station.
2. The tires have already been installed.
3. Your credit limit is used and the store rejects the use of the card.

POINTS TO CONSIDER

1. Try to use a check to pay for the tires. (It should not be accepted--policy of the station.)
2. You do not have enough cash on you to pay for the tires.
3. Let the student come up with the solution.
4. Don't become irate or argumentative but do question the procedures.
5. Try to treat each participant the same.

SCHEDULE DETAILS

Twenty (20) minute event as follows:

0:00 - 0:10	Participant will review instruction sheet and company policy sheet, and will plan strategies.
0:10 - 0:18	Practical with customer.
0:18 - 0:20	Judges will rate participant performance on evalution forms provided.

ADMINISTRATIVE SUGGESTIONS

1. Prep room is needed for ten (10) minute review of participant instruction sheet and company policy sheet.
2. Participation rooms are needed for eight (8) minute practical. Recommend three rooms.
3. Judges must have customer information sheet. Conduct run-through of entire event with all judges prior to competition.

MATERIALS/EQUIPMENT NEEDED

1. Participation rooms (3)
2. Prep room
3. Copies of participant information and company policy sheets
4. Copies of customer information sheet
5. Blank checks for judges
6. Counter
7. Stop watches (3)
8. Work sheet rejection

PERSONNEL NEEDED

1. Event Manager
2. Timer
3. Customers (3)
4. Judges (6)
5. Prep Room Assistant

RESPONSIBILITIES

A. Event Manager - This person is responsible for all major decisions necessary in this event. They will set up the event, brief all personnel, see that schedules are followed, materials are where needed and completed forms are turned into tabulation center.

B. Prep Room Assistants

1. Greet students and check their schedules to conform to correct order.
2. Give each participant copy of instructions and company policy sheets.
3. Maintain ten (10) minute prep time.
4. Direct participant to participation room.
5. Assist event manager as needed as time permits.

C. Timer

1. Maintain practical within eight (8) minute limit.
2. Assist event manager as needed as time permits.

D. Customer

1. Review participant information sheet and company policy sheet.
2. Follow customer script making certain that you feel comfortable with information sheet.
3. Be as consistent as possible with each participant.

E. Judges

1. Review participant information sheet and company policy sheet.
2. Review customer information sheet.
3. Understand evaluation sheet thoroughly.

Participant #__________

Service Station Retail
Communications
Judge Evaluation Form

JUDGE'S INITIALS__________

DID PARTICIPANT . . . .

	Excellent	Good	Average	Fair	Poor	Rating
1. Give an adequate explanation of store policy?	10 9	8 7	6 5 4	3 2	1 0	____
2. Give adequate reason for denial of credit card purchase?	10 9	8 7	6 5 4	3 2	1 0	____
3. Speak clearly so as to be understood (consider diction, enunciation, proper grammar, appropriate phraseology and proper English)?	10 9	8 7	6 5 4	3 2	1 0	____
4. Demonstrate courtesy at all times during conversation?	10 9	8 7	6 5 4	3 2	1 0	____
5. Listen and respond to customer questions?	10 9	8 7	6 5 4	3 2	1 0	____
6. Reflect a good business image of store and self?	10 9	8 7	6 5 4	3 2	1 0	____
7. Offer a feasible and practical solution to customer's problem?	10 9	8 7	6 5 4	3 2	1 0	____
8. Show a genuine concern for customer?	10 9	8 7	6 5 4	3 2	1 0	____
9. Demonstrate a cooperative attitude in working our course of action to be taken?	10 9	8 7	6 5 4	3 2	1 0	____
10. Thank customer for business?	10 9	8 7	6 5 4	3 2	1 0	____
					TOTAL POINTS	____

100 Possible Points

Name ____________________ Participant # __________

Service Station Retail *
Mathematics
Student Instructions

Merchandise Inventory Sheet

Inventory as of December 31

STOCK NO.	20"	24"	30"	36"	40"	48"	TOTALS
1501							
1502							
1503							
1504							
1505							
1506							
1507							
1508							

One (1) Point for each Stock No. Inventory and Total

Total Unit Inventory __________ (2 Pts.)

Total Inventory at Cost __________ (2 Pts.)

Total Inventory at Retail __________ (2 Pts.)

Oil Inventory as of December 31

TYPE	INVENTORY COUNT	COST	RETAIL
10 W 40			
10 W 30			
5 W 20			
5 W 30			
5 W 40			
TOTAL:			

Two (2) Points each Oil Type

Four (4) Points each Total

Merchandise Inventory Sheet

OIL

Oil Inventory as of December 1

TYPE	CASES (24 Count)	UNITS
10 W 40	4	2
10 W 30	4	7
5 W 20	5	11
5 W 30	2	1
5 W 40	2	4

Oil Sales for December (Mark-up 24%)

TYPE	UNITS	RETAIL PRICE
10 W 40	42	$2.00
10 W 30	21	$2.00
5 W 20	37	$1.52
5 W 30	28	$1.52
5 W 40	31	$1.52

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*This service station retail event was prepared by William Krosky as part of a U.S.O.E. funded project.

Service Station Retail
Mathematics
Administration Instructions

SCHEDULE DETAILS

This sixty (60) minute event will proceed as follows:

0:00 - 0:60 The participants will review the Student Instruction Sheet and Merchandise Inventory Sheets and will record all answers/totals in appropriate spaces.

ADMINISTRATIVE SUGGESTIONS

1. Large room for all participants.
2. Adequate space between each participant.

MATERIALS/EQUIPMENT NEEDED

1. Pencils and/or Pens
2. Copies of Answer Keys
3. Scratch Paper
4. Participant Instruction Sheets and Merchandise Inventory Sheets
5. Stop Watch

PERSONNEL NEEDED

Proctor/Timer/Grader (2-3)

RESPONSIBILITIES

A. Event Manager - This person is responsible for all major decisions necessary in this event. Manager will set up event, brief all personnel, see that materials are where needed and completed answer sheets are turned in to graders.

B. Timer

1) Distribute copies of Student Instruction Sheet/Merchandise Inventory Sheets.

2) Give instructions as to name and ID number.

3) Answer questions relating to event proceedings.

4) Limit event to sixty (60) minutes.

5) Assist event manager, proctors as needed as time permits.

C. Proctors

1) Survey identified portion of participants for full sixty (60) minutes.

2) Assist event manager and timer as needed as time permits.

D. Graders

1) Score as per Answer Key.

SLC - 1982

Service Station Retail*
Mathematics
Student Instructions

COMPETENCIES

Skill in multiplying and extending figures.

Skill in adding columns of figures.

Skill in taking accurate stock counts of merchandise for ordering, inventory, or unit book control.

Skill in using forms and records necessary in inventory control.

Knowledge of the procedures involved in merchandise count for physical inventory.

Knowledge of retail operating expenses including inventory, buying and selling procedures.

OBJECTIVES

The participant will demonstrate mathematics competencies necessary to determine inventory count, calculate cost and retail value of merchandise on hand at inventory time.

DESCRIPTION

The participant is employed in a full-service gasoline station. Using the information and data on Merchandise Information Sheets provided, the participant must determine the inventory count, and establish the cost and retail value for the merchandise in-stock as of December 31.

You are to assume you are employed in a full-service gasoline station and are to finish the inventory sheets for V-belts and oil on December 31. Mark-ups are figures on the retail price. Mark-down percentages are figures on original retail prices.

PROCEDURES

1. All answers are to be written on inventory sheets provided.
2. Scrap paper will be turned in with finished test.
3. All questions or blanks on test not answered will be considered wrong.
4. You have sixty (60) minutes to complete this activity. Use your time wisely.
5. There were no purchases of V-belts or oil in December.

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*This service station retail event was prepared by William Krosky as part of a U.S.O.E. funded project.

Merchandise Inventory Sheet

V-BELTS

Inventory as of December 1

STOCK NO.	20"	24"	30"	36"	40"	48"
1501	10	12	12	15	12	10
1502	8	9	10	12	8	7
1503	6	5	11	9	6	4
1504	7	11	8	10	6	3
1505	9	9	8	10	5	3
1506	12	10	14	14	9	6
1507	6	6	10	8	8	5
1508	14	10	16	10	12	8

V-Belt Sales for December

STOCK NO.	20"	24"	30"	36"	40"	48"
1501	8	9	10	12	9	7
1502	5	7	9	10	8	6
1503	5	5	8	6	5	3
1504	4	10	4	8	4	2
1505	9	4	6	9	3	0
1506	12	3	11	14	3	6
1507	5	2	7	6	7	4
1508	10	8	11	9	10	7

V-Belt Stock No. 1501-1504	Retail @ $6.00	(40% Mark-up)
V-Belt Stock No. 1505-1508	Retail @ $8.50	(40% Mark-up)